



Campbelltown

Strategic review of employment land - Strategy

DRAFT – NOT COUNCIL POLICY

Prepared for
Campbelltown City Council
August 2020



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Quality assurance

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A photograph of a modern, multi-story commercial building with large windows and a flat roof. The building is set in an employment lands area with a paved parking lot in the foreground. Several cars are parked, including a white SUV on the left and a white sedan in the center. Yellow directional arrows are painted on the pavement. The entire image is overlaid with a semi-transparent dark blue filter. A white rectangular border frames the central text.

CAMPBELLTOWN'S EMPLOYMENT LANDS

1.0 CAMPBELLTOWN'S EMPLOYMENT LANDS

To position Campbelltown as an attractive place to do business, invest and work, means building on its competitive advantage and promoting its strengths.

Campbelltown's employment lands contain diverse retail, business and industrial opportunities accommodated within employment precincts and centres. They are supported by a growing population and have strong infrastructure connections. They benefit from the strategic assets of tertiary education institutes, major regional hospitals, passenger and freight rail and motorway access and a Metropolitan Cluster designation.

Campbelltown City is Sydney's
lifestyle capital...

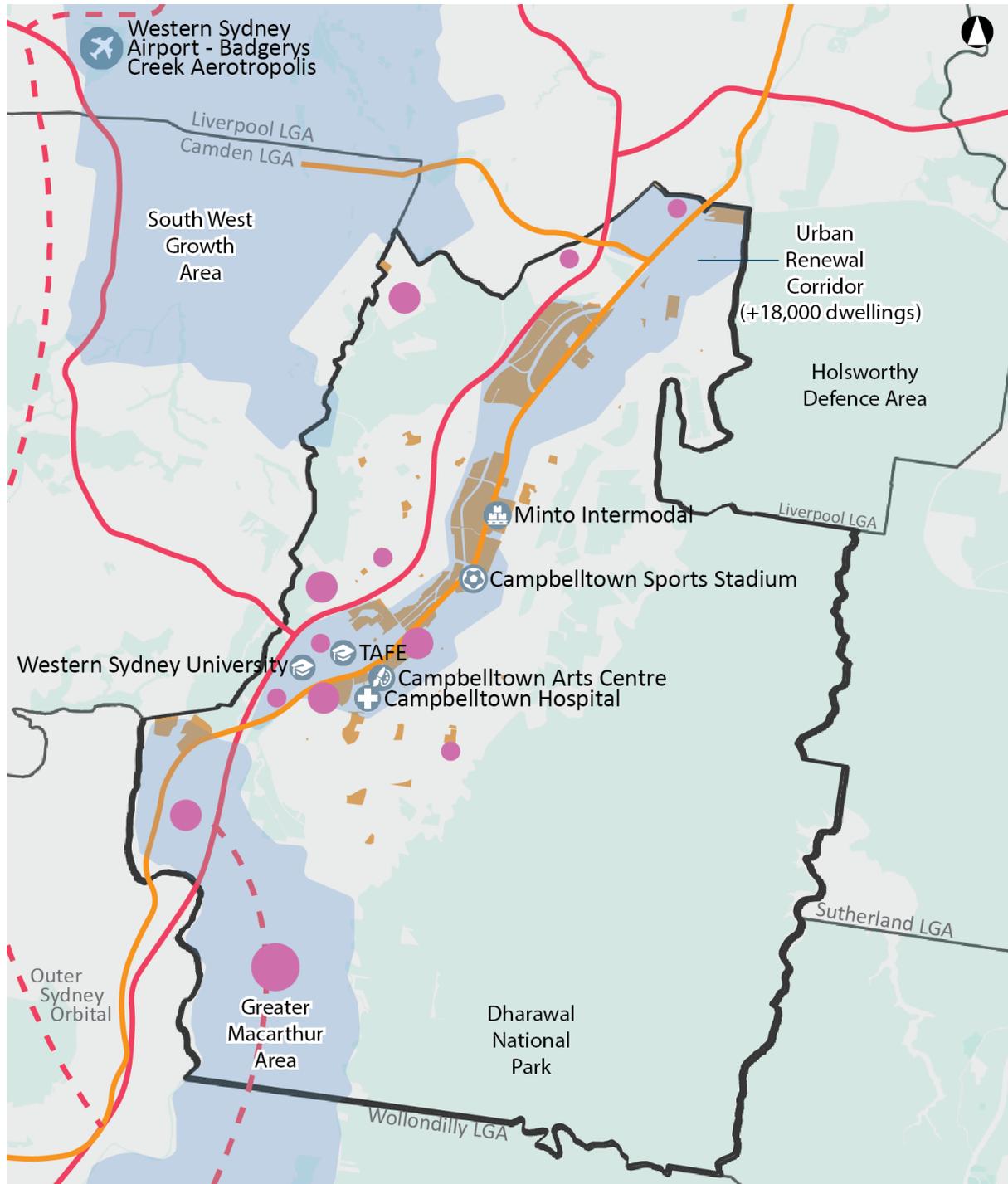
People choose to live, work, play and visit because quality of life
is second to none. (Campbelltown 2040 – LSPS 20 year vision)

The network of local and neighbourhood centres is growing with new residential release areas needing to be supported by thriving and walkable centres. Urban renewal opportunities exist along the rail corridor as more demand arises for mixed use development, higher density housing and vibrant and dynamic precincts. The industrial areas are productive, however, future expansion opportunities are constrained with a need for existing areas to densify and lead by example in supporting new-age manufacturing and transport and logistics.

Located 53 kilometres southwest of the Sydney CBD. The LGA is characterised by its historically low-density living lifestyle, regionally significant rail and road infrastructure and large tracts of protected environmental land. Covering an area of 312 square kilometres the LGA extends from Glenfield in the north, Menangle Park and Gilead in the south, the scenic hills in the west and the Holsworthy Military Reserve to the east.



Figure 1: Campbelltown LGA in the broader context



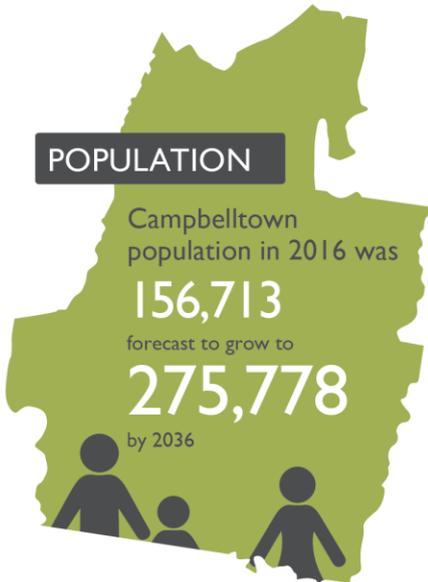
LEGEND

- | | | |
|--------------------|---------------------------|---|
| Employment lands | Major highway | Future residential release
100-1,000 dwellings |
| Railway line | Future transport corridor | 1,000-10,000 dwellings |
| State growth areas | | Over 10,000 dwellings |

Source: HillPDA 2020

THE LOCAL PROFILE

POPULATION



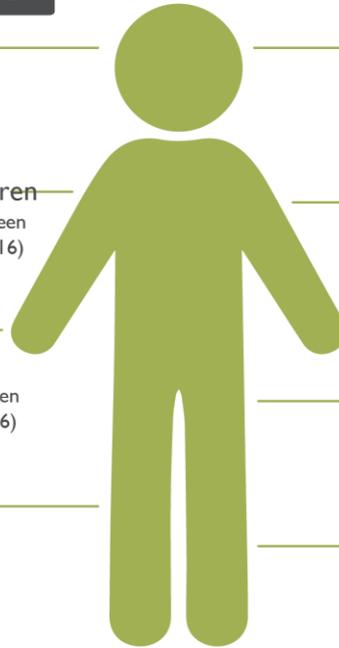
DEMOGRAPHICS

Median age **34** (slight increase since 2011)
Greater Sydney 36

Couples with children **38%** (stable between 2011 and 2016)
Greater Sydney 35%

Lone person households **17%** (stable between 2011 and 2016)
Greater Sydney 20%

Language at home other than English **30%** ↑
Greater Sydney 36%



Aboriginal and Torres Strait Islander Population **3.8%** (slight increase since 2011)
Greater Sydney 1.5%

Older couples without children **7%** ↑
Greater Sydney 8%

Overseas born **31%** ↑
Greater Sydney 37%

Homeless persons estimated 2016 **928** ↑

EDUCATION

University attendance **4%** ↑
Greater Sydney 6%



University qualification **15%** ↑
Greater Sydney 28%



Trade qualification (certificate) **21%** ↑
(slight increase since 2011)
Greater Sydney 15%



THE WORKFORCE

Local workers **48.7%** of Campbelltown's local workers are residents (2016)

11,292 people (23.2% of Campbelltown's local workers have tertiary qualification.

49.9% of the local workforce are male 50.1% are female



Campbelltown's Gross Regional Product was \$7.27B for year ending June 2019 growing 2.5% since the previous year.

Jobs to workers ratio for Campbelltown in 2018/19 was 0.75 (less jobs than resident workers).

Resident worker location **34%** of Campbelltown's resident workers were employed locally (2016)

42,489 or 61.8% of Campbelltown's resident workers travel outside the LGA to work.



18% of Campbelltown's resident workers catch public transport to work

Unemployment rate **7.9%** (resident workforce 2016)
Greater Sydney 6.0%

Participation rate (population in labour force) **61%** (slight decrease since 2011)
Greater Sydney 62%

Largest employer
Campbelltown's largest employer was health care and social assistance, generating 9,287 local jobs (2016)



↑ Increasing trend ↓ Decreasing trend

Source: HillPDA, Infographic adapted from Campbelltown 2040 LSPS, Numerical figures sources from id. Consultants (Census 2016 stats)

Strengths

Strategic context



- Located along and within close proximity to major arterial roads including the Hume Motorway, M5, M7, Appin Road, Narellan Road and The Northern Road which provide convenient access to major employment centres including Sydney CBD, Parramatta CBD and the future Western Sydney Aerotropolis as well as more regionally to Wollongong, Southern Highlands and the ACT.
- Well connected by heavy rail and roads supporting industrial uses as a hub in the network of industrial lands, including the intermodal terminal at Minto. Located on the main southern railway line with connections to the South West Rail Link.
- Retail destination for the wider region attracting shoppers from surrounding LGAs including Camden, Wollondilly and the southern highlands area.
- Established regional facilities including hospital, retail services, university, specialised retail premises, industrial precincts and administration services.
- Reimagining Campbelltown is creating a new vision for Campbelltown City Centre as a cultural, employment, commercial and health and education hub for Macarthur region.
- The Australian Botanic Garden, Holsworthy Military base and the 2,000 ha of National Parks across the LGA provide open space benefits to the community and contribute to the landscape character of the area.
- Ingleburn and Minto are major industrial areas serving the broader regional catchment.

Site characteristics



- Large industrial lots in Campbelltown LGA attract large manufacturers and other large-scale businesses over areas such as Wetherill Park and Milperra.

Planning



- Government investment across the wider Western City District is significant with infrastructure upgrades including the new airport, proposed road and rail corridors, hospitals and public housing renewal creating growth opportunities.
- The Local Strategic Planning Statement vision for 2040 includes retaining the natural and historic cultural landscape whilst building local economic activity and employment. This is achieved by maximising urban growth opportunities and limiting urban sprawl.



Opportunities

Strategic context



- Differentiate from centres like Liverpool and Camden.
- Support and strengthen the established manufacturing and transport, warehouse and logistics industry
- Revitalise the area, particularly Queen Street, to attract professional service industries, research institutes and office based industries that can support retail trade and attract allied investment
- Support the growth of emerging industries such as agribusiness and food product manufacturing
- Grow communities with employment, education and community services leveraging from the Campbelltown Hospitals and Western Sydney University campus.

Built form



- Provide the appropriate and adequate scale infrastructure and amenities to support workers and businesses in professional services
- Compete with centres in surrounding LGAs (i.e. Camden, Liverpool and Narellan)
- Improve connectivity between Queen Street and the railway station.

Planning



- Support an anchor/flagship attractor to bring in businesses and professional services, eg university, stadium upgrade, business park or expanded justice precinct
- Upgrade of the Campbelltown Stadium is an opportunity to attract additional business and industry to the area while building community spirit with the introduction of the Macarthur FC A-League football team
- Glenfield rail junction could have a business hub to support the updated high school and new residential development
- The Western Sydney Aerotropolis and growth across the Western Sydney District will provide new homes and population adjacent to the LGA leveraging off the centres at Leppington, Campbelltown-Macarthur and Liverpool
- Early planning, at a State Government level, for the Outer Sydney Orbital motorway and the freight rail line is currently underway. Planning for the impact of this on the economic character of the LGA and its future role will be necessary.



The policy and literature context

Theme	Insights
<p data-bbox="268 1016 357 1039">Land use</p> 	<ul style="list-style-type: none"> ● Industrial and urban service land in Campbelltown is identified under the ‘retain and manage’ category in the Greater Sydney Region Plan, which suggests that all existing industrial and urban services land should be safeguarded from competing pressures such as mixed-use zones or residential development (Region Plan, p134, Figure 42). ● Increasing the level of residential development within walking distance of a supermarket is a desirable liveability outcome (Region Plan, 2018, p120 and Reimagining Campbelltown 2020) ● Campbelltown-Macarthur, as a Metropolitan Cluster, should provide higher order jobs and a wide range of goods and services (Region Plan, 2018, p119). ● Buffer areas should be provided to nearby activities, such as residential uses, that are sensitive to emissions from 24-hour port and freight functions (District Plan, 2018, Action 28) ● Retain industrial lands for a port, intermodal and logistics uses from the encroachment of commercial, residential and other non-compatible uses which would adversely affect industry viability to facilitate ongoing operation and long-term growth (District Plan, 2018, Action 28). ● Land is proposed to be rezoned for industrial and urban services in South West Growth Area and Greater Macarthur Growth Area (District Plan, p89). ● The Glenfield-Macarthur Urban Renewal Corridor Strategy proposes more jobs and homes closer to the station precincts. ● Recognise the significance of existing employment lands along the major rail and road corridors and ensure that larger sites remain available to meet the long term demands of the logistics industry (Employment Lands Review, 2011). ● Planning and investing in the revitalisation of Campbelltown-Macarthur CBD, Ingleburn and other town centres (Campbelltown 2027). ● Prepare masterplans for the town centres identified within the Glenfield to Macarthur Urban Renewal Corridor that incorporate opportunities for in-centre living (Campbelltown LSPS, 2019).

Theme	Insights
<p data-bbox="213 342 411 367">Leveraging anchors</p> 	<ul style="list-style-type: none"> ● Campbelltown City has been identified as a ring university town with an opportunity to build on the existing tertiary facilities. The Greater Sydney Region Plan envisions a minimum of 10,000 students in each city, co-located with TAFE facilities (Region Plan, 2018, p109). ● Intent to anchor university presence at Campbelltown-Macarthur around the NSW Government’s investment in the hospital and facilitate the emergence of the health and education precincts (Region Plan, 2018, p109). Reimagining Campbelltown proposes a vertical university in the CBD. ● \$632 million has been committed for the Campbelltown Hospital Redevelopment Stage 2, mental health services and paediatric services (District Plan, 2018, p84). ● The new NSW Government– University funded Macarthur Clinical School at Campbelltown Hospital (District Plan, 2018, p84). ● The construction of the Campbelltown Sports and Health Centre of Excellence at Western Sydney University (District Plan, 2018, p84). ● Advocate the NSW Government for the decentralisation of administrative functions to Campbelltown CBD potentially including a Legal Justice Precinct and/or significant augmentation to the existing District Court facilities and services (Campbelltown LSPS, 2019). ● Western Sydney University’s commitment to develop a CBD campus (Reimagining Campbelltown 2020). ● Development of a new Macarthur Medical Research Centre integrated with the hospital campus (Reimagining Campbelltown 2020).
<p data-bbox="261 987 363 1012">Built form</p> 	<ul style="list-style-type: none"> ● The adaptation of buildings to accommodate high-bay automation requires building heights greater than existing buildings and current planning limits. Increased building heights are needed for the evolution of industrial buildings (Region Plan, 2018, p131). ● Industrial land adjacent to train stations is, in the main, part of large intact industrial precincts or directly linked to the freight rail network and therefore highly valuable industrial land – it is not suitable for conversion to residential (Region Plan, 2018, p130). ● Some older industrial sites contain low buildings or constraints such as smaller lots that are unable to meet emerging freight and logistics needs. Review older sites to identify opportunities for new industrial uses with higher job densities (District Plan, 2018, p93). ● Create a framework for future development that encourages increased amenity, aesthetics, public domain and open space (Campbelltown LSPS, 2019).

Theme	Insights
<p data-bbox="225 338 400 365">Target industries</p> 	<ul style="list-style-type: none"> • Promote and enable appropriate development of the Campbelltown Health and Education precinct to respond to local and broader health needs and promote employment and education opportunities (Campbelltown LSPS, 2019). • The Jobs for the Future report, by Jobs for NSW, identifies 11 segments that NSW should target. Segments relevant to Campbelltown City include international education; regional headquarters of multinationals; start-ups and digital innovation; advanced manufacturing; life sciences and environmental technologies (Region Plan 2018). • Investigate the growth of allied health and medical related businesses, research, science and advanced manufacturing (Campbelltown Economic Development Strategy, 2020). • Opportunity target sectors are health and education, industrial and agribusiness (Campbelltown Economic Development Strategy, 2020). • Increasing online ordering and home delivery is driving demand for ‘dark retail’ stores. These stores are most suited to industrial areas located with strong access to the road freight network (Region Plan 2018). • Specialise in mental health, indigenous health and endocrinology (Campbelltown Macarthur Place Strategy, 2020). • Investigate opportunities for the growth of allied health and medical related businesses, research, science and advanced manufacturing (District Plan, 2018, p84). • Increase opportunities for creative, digital and technology businesses and employees (District Plan, 2018, p84). • Developing tourism opportunities and promoting Campbelltown as a destination (Campbelltown 2027). • Support the development of the local economy through business innovation and growth, attracting professional organisations that provide a range of employment opportunities (Campbelltown 2027). • Labour-intensive sectors of health, aged care and social assistance, education and training, and personal services are important for the economy. • Growth in the home-based businesses and start-up sectors is highlighted as important to consider as supporting these industries would need to include consideration of the need for commercial space as businesses grow. • Create a diversity of arts related businesses including the development of a Creative Industry Hub that can grow in line with the city and add vibrancy across the region (Campbelltown LSPS, 2019).
<p data-bbox="269 1395 355 1422">Housing</p> 	<ul style="list-style-type: none"> • Housing target of 6,800 to 2021 identified in the South West Growth Area and Greater Macarthur Growth Area comprising: — Glenfield to Macarthur Corridor – including Precincts at Macquarie Fields, Ingleburn, Minto, Leumeah, Campbelltown and Macarthur, as well as the: — Glenfield Planned Precinct — Menangle Park, Gilead and Appin (District Plan 2018, p41). • By 2036, Campbelltown will be home to a population of 275,778 residents, a growth of 31,690 from 2016. This will generate a demand for between 26,000 and 40,000 new dwellings (Campbelltown LSPS, 2019).

Theme	Insights
<p data-bbox="261 342 363 365">Transport</p> 	<ul style="list-style-type: none"> <li data-bbox="448 342 1385 454">● Port Kembla has approval to expand container handling capacity. There will be a need to enhance and develop new road and rail connections from Port Kembla to freight networks, specifically intermodal facilities in the Western Parkland City. This creates long term land use opportunities for Gilead and Campbelltown-Macarthur. <li data-bbox="448 465 1385 633">● Greater Sydney’s freight task is forecast to more than double in the next 40 years. Campbelltown City is located on the Southern City Freight Link, Main South Link and Hume Motorway – the northern sector of the LGA is identified as a Freight activity precinct that runs down from Liverpool (NSW Freight and Ports Plan, 2018). Planning for the alignment of the Outer Sydney Orbital, including integrating land use activities with these intra and inter-regional transport connector. <li data-bbox="448 645 1385 701">● Potential north-south passenger train corridor to the health and education assets at Campbelltown-Macarthur. <li data-bbox="448 712 1385 768">● Investigate extension of rail connection from Glenfield to Western Sydney Airport (Western Sydney City Deal, 2018). <li data-bbox="448 779 1385 891">● The Western Sydney Infrastructure Plan includes the new M12 Motorway and The Northern Road and Bringelly Road upgrades. The Western Sydney Growth Roads Program includes upgrades to Narellan Road, Campbelltown Road, Jane Street and Mulgoa Road and Appin Road with intersection upgrades at Menangle Park (District Plan, 2018, p66). <li data-bbox="448 902 1385 981">● The city-serving network will provide high frequency, rapid bus connections between Western Sydney Airport – Badgerys Creek Aerotropolis and Campbelltown-Macarthur (District Plan, 2018, p66). <li data-bbox="448 992 1385 1070">● Investigation of integrated transport and delivery options for a full North South Rail Link from Schofields to Macarthur. This would connect Campbelltown to Western Sydney Airport and the Badgerys Creek Aerotropolis (Western Sydney City Deal, 2018) <li data-bbox="448 1081 1385 1137">● Prioritise sustainable transport connections, particularly walking and cycling infrastructure within the city.



Strategic directions

Improve the utilisation and appeal of existing employment land

Campbelltown LGA has around 107.5 hectares of vacant land zoned for employment uses. This is distributed between employment precincts (90.9 hectares) and business centres (16.6 hectares). While this land is vacant, in some instances it is being used for purposes such as car parking or storage.

Encouraging the redevelopment and higher utilisation of vacant land and underutilised commercial and industrial land can assist in delivering more floor space and meeting future demand.

Secure a sustainable long term supply of appropriate employment land

Forecasts indicate that the current supply of zoned employment land is insufficient to meet the needs of future residents and workers. The shortage is particularly critical for industrial land. Timely delivery of additional land is contingent on commencing the process in advance of expected demand factors to accommodate for the lead-in period and to ensure land prices and rents do not escalate to unsustainable levels. The lead-in period includes time for the planning and rezoning of land, subdivision, servicing and development approvals, in addition to the land being serviced with key infrastructure.

The Greater Macarthur Growth Area does not plan for substantial employment land within the LGA boundaries. That which it does include, at Menangle Park, is subject to significant infrastructure investment. While there is a desire for an additional business park in the LGA, this will not necessarily meet the demand for industrial space or specialised retail services. New centres will also need to be planned in locations that can be supported by a strong residential catchment, without undermining the existing centre hierarchy. There is an immediate need to plan for new employment land, particularly industrial land, in the Greater Macarthur Growth Area.

Promote an attractive investment environment

Positioning Campbelltown LGA as an attractive investment environment, will contribute to a sustainable enterprise base and build business and job opportunities. Revisiting planning controls and ensuring they align with future growth expectations is key to supporting investment attraction.

Western Sydney is a rapidly growing district with a lot of council's vying for infrastructure and business investment. There is a need to establish and promote Campbelltown as 'open for business' and as a reliable investment location.



Deliver a diversity of jobs that provide options for employment within the local area

Over 60 per cent of Campbelltown’s resident workforce leave the LGA for work. Furthermore, the number of jobs available in the LGA is less than the number of working residents, suggesting that even if all working residents in the LGA wanted to remain in the LGA for work, there would not be enough jobs available. As identified in Chapter 3 of the Background Report, there is also a mismatch between the jobs that residents work in and those that are available in the LGA.

Attracting a greater diversity of employment and learning opportunities can assist in unlocking jobs for residents and boosting the self-containment rate of the LGA. Tailoring education courses and formulating pathways into local industries can boost the job containment rate of the LGA. Fostering an environment of learning and collaborating can be attractive to businesses and encourage greater investment and business establishment.

Manage development to respect the function and role of centres and employment precincts

Business centres and employment precincts across Campbelltown LGA have a unique identity and distinct purpose that should be protected and enhanced. It is important to retain and improve the character and intended purpose of centres and employment precincts while still facilitating development and employment opportunity.

At present, Campbelltown has eight employment zones with an intent to facilitate jobs and economic productivity. As discussed in Chapter 7 of the Background Report, there is limited distinction between the B3 Commercial Core and B4 Mixed Use Precinct. The B7 Business Park precinct, while distinct, can undermine the viability of office space in the B3 Commercial Core.

The IN2 Light Industrial and B5 Business Development zones can act as buffers between residential zones and IN1 General Industrial zones. This would enable disruptive uses (i.e. industry that is loud and odorous) to be screened from sensitive receivers (such as dwellings, childcare), protecting the long-term role and function of IN1 General Industrial.



EMPLOYMENT PRECINCTS

2.0 EMPLOYMENT PRECINCTS

2.1 Defining employment precincts

As defined by the Department of Planning, Infrastructure and Environment's (NSW DPIE) Employment Lands Development Monitor (ELDM), employment precincts are defined as:

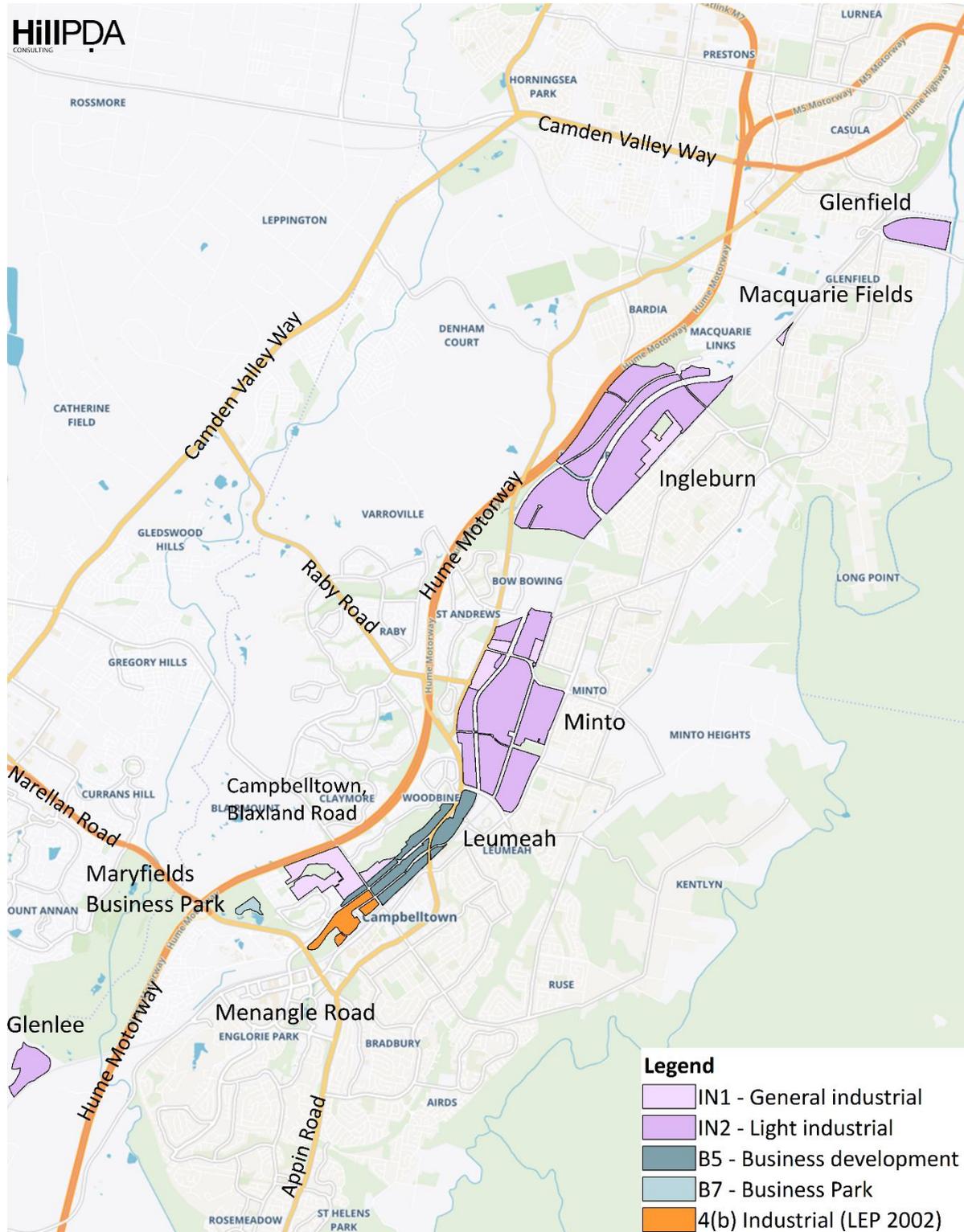
“land zoned for industrial or similar purposes in planning instruments. They are generally lower density employment areas containing concentrations of businesses involved in manufacturing; transport and warehousing; service and repair trades and industries; integrated enterprises with a mix of administration, production, warehousing, research and development; and urban services and utilities.

They are vital to the functioning of our urban areas, providing space for:

- Essential services such as waste and water management, repair trades and construction services
- Warehousing, logistics and distribution centres
- Areas for businesses that design, manufacture and produce goods and services”.

The Campbelltown employment precincts are identified in Figure 2. Employment precincts primarily encompass land zoned as IN1 General Industrial, IN2 Light Industrial, B5 Business Development, and B7 Business Park. The Deferred Matter area is zoned a 4(b) – Industrial under Campbelltown (Urban Area) LEP 2002 and as such is operating as an employment precinct.

Figure 2: Employment precincts



Source: HillPDA 2020

2.2 Existing land and floor space

NINE employment precincts	772 hectares of land within employment precincts	2.9 million sqm of floor space within employment precincts
-------------------------------------	--	--

In 2019, there were nine employment precincts located within Campbelltown LGA. Combined these precincts provided around 772 hectares of appropriately zoned employment land, of which, around 680 hectares or 88 per cent was developed while around 90 hectares or 12 per cent was undeveloped.

Across the Western City District, Campbelltown accounted for around 13 per cent of employment precinct zoned land and contained 5 per cent of identified undeveloped employment precinct zoned land. With the population and employment growth projection forecast to occur in the LGA over the next few decades, this amount of undeveloped land would be insufficient for the LGA’s needs. Consequently, greater development densities will need to be achieved in the existing employment precincts and new land will need to be made available.

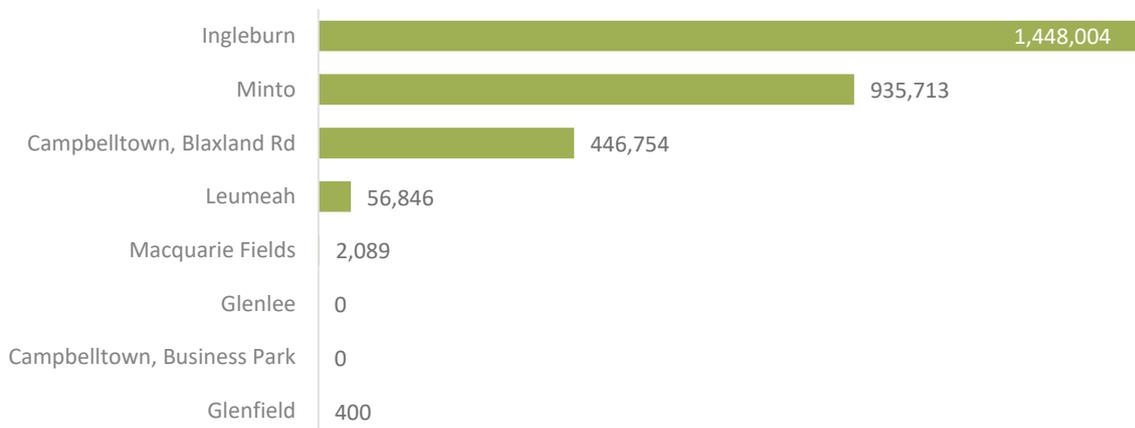
Table 1: Employment precinct by land zoning (hectares)

Precinct	B5	B7	IN1	IN2	DM*	Total
Campbelltown Blaxland Road	47.9			53.2	12.4	113.6
Maryfields Business Park		6.0				6.0
Glenfield			28.7			28.7
Glenlee			28.1			28.1
Ingleburn			298.5	17.9		316.4
Leumeah	19.5					19.5
Macquarie Fields				1.2		1.2
Menangle Road	1.7					1.7
Minto			233.4	23.0		256.4
Total	69.1	6.0	588.6	95.4	12.4	771.5

Source: HillPDA* Campbelltown Blaxland Road inclusion area

It is estimated that around 2.9 million square metres of employment space is provided across the nine employment precincts. The largest employment precinct, by total employment floorspace, was Ingleburn with around 1.5 million square metres representing 50 per cent of the combined floorspace in the LGA’s employment precincts.

Figure 3: Total employment space by employment precinct (sqm)



Source: HillPDA, excludes residential space and Menangle Road (0sqm)

Of the total employment space across all the nine precincts, the largest amount was attributed to the industry of manufacturing with around 1.4 million square metres or 48 per cent of all employment space. This was followed by transport, postal and warehousing with 509,610sqm or 18 per cent, wholesale trade with 180,880sqm or 6 per cent, construction with 173,370sqm or 6 per cent and retail trade occupying 162,345sqm or 6 per cent of the total employment floorspace. As can be seen in Table 2, the precincts are generally operating in line with their intended role and function.

Table 2: Precinct estimate employment floorspace by broad industry category*

	Blaxland Road	Glenfield	Ingleburn	Leumeah	Macq. Fields	Minto	Total
Health and education	13,797	0	11,508	1,543	0	4,338	31,186
Industrial	247,411	400	1,159,312	12,468	1,609	812,011	2,233,212
Knowledge intensive	16,844	0	45,882	1,232	0	20,496	84,453
Population serving	160,802	0	204,304	40,543	480	81,420	487,549
Vacant space	7,899	0	26,999	1,060	0	17,447	53,405
Total	446,754	400	1,448,004	56,846	2,089	935,713	2,889,806

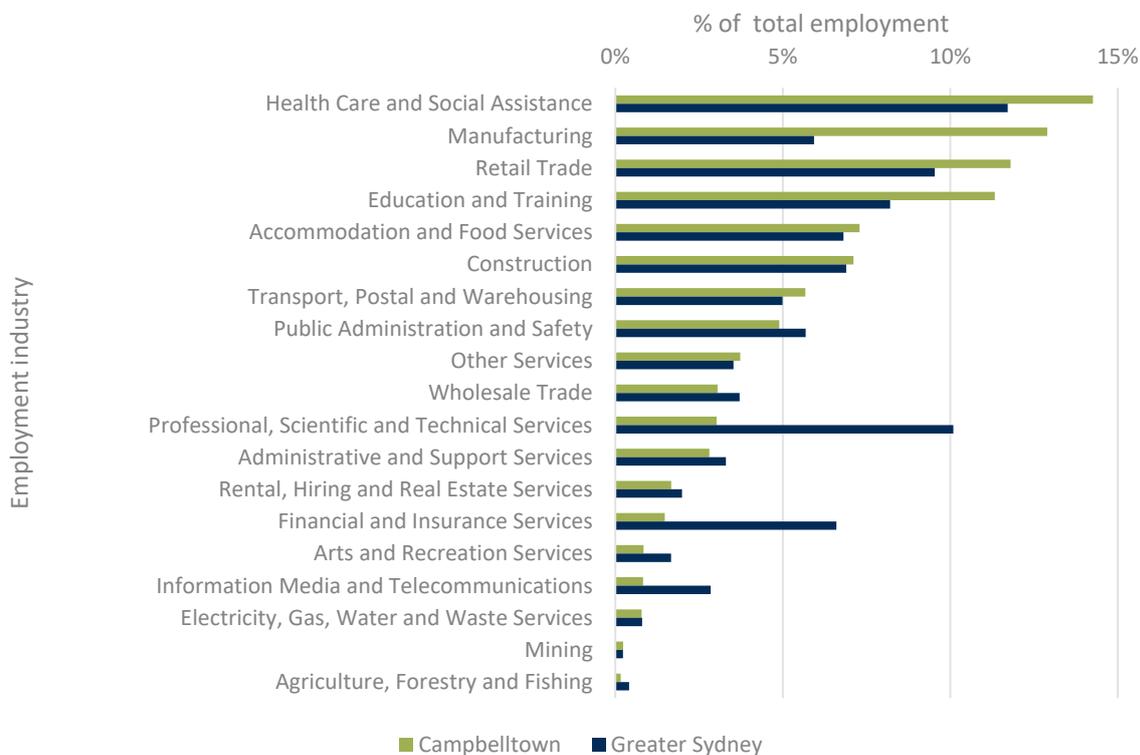
*Excludes Glenlee, Menangle Road and Maryfields Business Park as they contained no floorspace.

Source: HillPDA 2019

2.3 Job distribution

Campbelltown has a strong industrial market, with the manufacturing industry identified as a major specialisation in the LGA, when compared to Greater Sydney (see Table 3, Background Report). As can be seen in Figure 4, manufacturing is the second largest job generator, closely behind retail trade.

Figure 4: Industry configuration (portion of jobs, 2016)



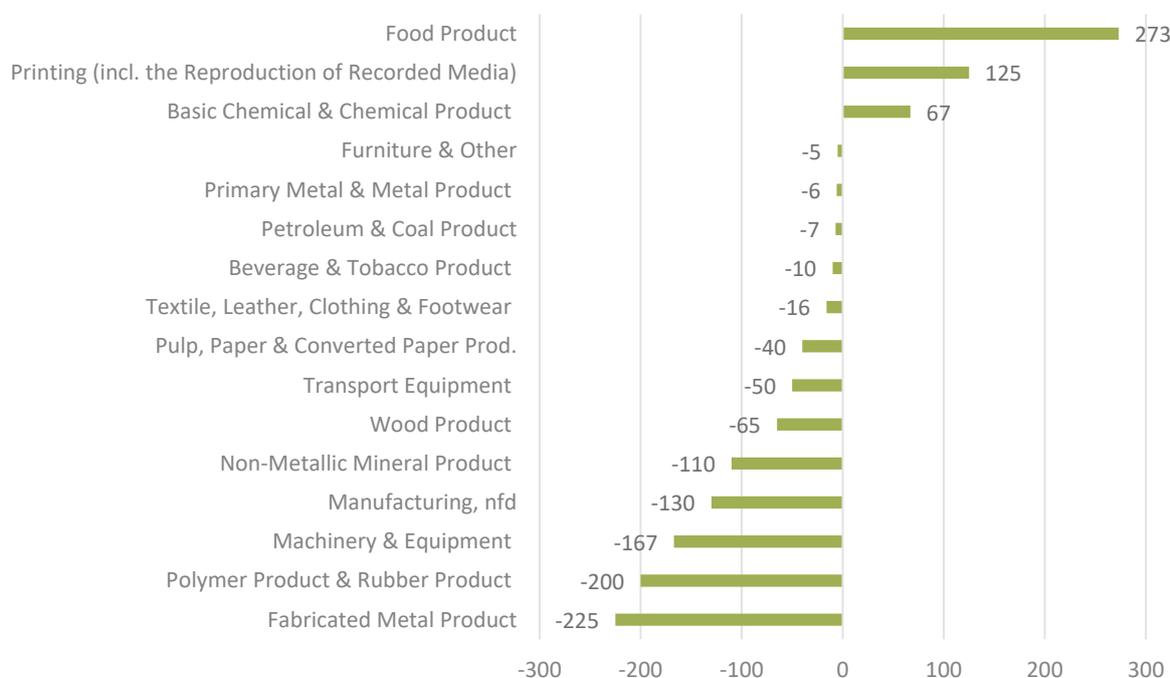
Source: id, Campbelltown City Economic Profile (2019)

While the manufacturing sector experienced a large overall decline in jobs, with a loss of 562 jobs, 45 sub-manufacturing sectors experienced an increase in employment over the same period. The trends are demonstrated in Figure 5 and indicate that:

- The growth was in food product manufacturing, printing and basic chemical and chemical product manufacturing
- The sectors with the greatest loss in employment in this time were fabricated metal product manufacturing, polymer product and rubber product manufacturing and machinery and equipment.

Despite the decline, manufacturing remains a key industry of employment for both locals and those travelling to Campbelltown for employment. The shift in types of manufacturing employment within the industry indicate changes in demand for the style and location of commercial and industrial spaces, particularly those near to major transport routes. Food product manufacturing is a niche industry that should be further explored and encouraged.

Figure 5: Manufacturing industry change 2006 -2016



Source: (Australian Bureau of Statistics, 2016)

Between 2016 and 2018 the number of businesses in Campbelltown grew by 1,320. The largest sector of growth with 548 new businesses was transport, postal and warehousing, a 45 per cent increase over the two-year period. Both the manufacturing and transport, postal and warehousing industries are primarily operating out of Ingleburn and Minto employment precincts.

It is estimated that in 2017/18, industries within Campbelltown contributed around \$5.5 billion to its GDP. Manufacturing was the largest contribution to this, with an estimated \$1 billion value added.

2.4 Employment precinct market trends

The demand for industrial floorspace is influenced by trends such as globalisation and the use of information technology. Table 3 explores some of the broader market trends being seen across the industrial sector and associated implications for Campbelltown.

Table 3: Employment precinct market trends

Broad market trends	Implications for Campbelltown
<p>Non-traditional uses within industrial areas</p> <p>Industrial precincts (IN1 and IN2) are increasingly being occupied by other non-traditional uses such as knowledge intensive businesses, large format retailers and factory outlets and education/health services. The presence of these uses, however, can increase market rents and land values in industrial precincts</p>	<p>Permitted uses in industrial areas should be limited to those that require separation from sensitive receivers. Delivering an appropriate supply of B5 Business Development and B7 Business Park zoned land can reduce the pressure on IN1 and IN2 zoned industrial land. This then preserves the industrial areas for uses that require greater separation from sensitive receivers. Consider prohibiting self-storage and landscaping material supplies from the IN1 General Industry area and permitting vehicle body repair workshop and plant nurseries in the IN2 zoned land.</p>
<p>The proximity of employment precincts to key transport routes has emerged as a key priority for industrial occupiers. The reasons for this locational preference stems from transport costs, typically comprising a large share of an industrial businesses’ operational cost base, compared to its rental cost. As such, an industrial business makes costs savings by locating themselves nearer to key infrastructure.</p>	<p>Any new industrial land should be planned in locations that have strong access to motorway connections and, if possible, rail freight connections. These connections should have multi-directional access intersections. Industrial land to the south of Macarthur would be preferable to more equitably distributed employment precincts across the LGA.</p>
<p>Industries associated with manufacturing and transport, warehousing and distribution are at the forefront of automation and technology advancements. This is forecast to cause a reduction in overall employment generated, however, not necessarily translate into a reduction in the amount of floor space or land required. As such, although these industries require fewer people for their operation needs, they still would require appropriate space and land.</p>	<p>The changing landscape of the manufacturing sector will unlikely reduce the floorspace requirements of an industry as the machinery still takes up the same or more space. It is therefore prudent to appropriately plan for the future land based needs of these industries even as their employment densities shift.</p> <p>Increased automation may enable the opportunity for greater site utilisation with reduced parking demand and opportunity for multi-storey and high bay industrial types.</p>
<p>The rise of e-commerce has seen significant growth in the demand for freight and logistics industrial space in close proximity to customers, often referred to as “last mile” customer logistics.</p>	<p>Campbelltown’s employment precincts provide ideal locations for last mile logistics services as they are close to population centres and have good access to major highways and motorways.</p>
<p>Historically, industrial developments typically have been single level, on large lots, with at grade parking and on relatively level ground. As land stocks become more constrained, scarce and as land values increase, multi-storey and high bay industrial development will become commonplace.</p>	<p>In a location like Campbelltown, which has a strong industrial market but constrained expansion opportunities, “upward redevelopment”, subject to viability would enhance the efficiency and opportunity of the existing industrial precinct. Current planning controls in the CLEP 2015, limit industrial building height to 12m. A recent amendment seeks to increase this to 19m. Consider removing height controls in industrial precincts completely to enable greater development opportunity and adaptability as industry needs change. A merit assessment of building height could instead be conducted with consideration of visual and other amenity impacts and where located in Campbelltown City Centre by the height guidance in Reimagining Campbelltown 2020.</p>

2.5 Guiding principles

Several principles contribute to the suitability of land that should be considered when analysing and determining future employment land use requirements. These are overviewed below.

People – diverse opportunities for employment and learning	Land – adequate, appropriate and long term supply of land	Built form – appropriate space that meets current and future needs
 <ul style="list-style-type: none"> • The proximity of a skilled and available local workforce • Provides for a diversity of employment opportunity including part-time, full time or casual work • Opportunities for further education and up-skilling including the availability and accessibility of suitable educational institutions, training courses and apprenticeship programs in the LGA. 	 <ul style="list-style-type: none"> • The quantum of land or space available for rent/purchase on the market at any given time • A suitable pipeline of appropriately zoned land to meet current and future requirements • Land constraints can be feasibly addressed • Affordability of land from a sale and rent perspective • The scale of sites is suitable for the needs of a given industry. 	 <ul style="list-style-type: none"> • Flexibility and adaptability in planning controls • Incentives for new industrial development to meet current and future needs • Appropriateness of zoning and planning controls to facilitate the business requirements.
Infrastructure –is aligned with current need and future growth	Economic – a sustainable and productive long-term economy	Place – attractive place of employment
 <ul style="list-style-type: none"> • Appropriate and available water and wastewater services, sewerage and electricity • Appropriate road classification for vehicle movement • Efficient connections to motorway and (preferably) freight rail service 	 <ul style="list-style-type: none"> • Opportunity to cluster and agglomerate • Opportunity to leverage available infrastructure and industries • Number and types of competing businesses and centres either to support clustering opportunity or influence demand. 	 <ul style="list-style-type: none"> • The appeal of social infrastructure and networking services to attract and retain employees to the LGA • An attractive and safe urban environment • Affordability and suitability of residential accommodation within reasonable proximity of employment • Proximity and access to support services such as local shops, entertainment, childcare, schools, doctors etc. • Efficient access to public transport

2.6 Future demand and capacity

The floorspace demand modelling indicated that between 29,000 and 38,000 jobs would be required in employment precincts to meet future population growth. Using employment densities allocated to industries, this would generate a need for an additional 928,000 to 1.8 million square metres of floorspace to 2041 (see Table 4).

Table 4: Floorspace projections by precinct (sqm) to 2041

Precinct	Current space 2019	Total demand 2041			Total net change		
		Scenario 1	Scenario 2	Scenario 3	Scenario 1	Scenario 2	Scenario 3
Campbelltown Blaxland Road	446,754	722,604	817,747	903,450	275,850	370,993	456,697
Maryfields Business Park	0	8,571	9,700	11,900	8,571	9,700	11,900
Glenfield	400	1,122	1,270	1,638	722	870	1,238
Glenlee	0	6,464	7,315	8,855	6,464	7,315	8,855
Ingleburn	1,448,004	1,832,054	2,073,275	2,238,777	384,050	625,271	790,773
Leumeah	56,846	72,231	81,741	95,325	15,384	24,895	38,479
Macquarie Fields	2,089	4,410	4,991	5,397	2,321	2,902	3,308
Menangle Road	0	0	0	0	0	0	0
Minto	935,713	1,171,221	1,325,432	1,414,193	235,509	389,720	478,480
Total	2,889,806	3,818,677	4,321,471	4,679,536	928,872	1,431,665	1,789,730

Source: HillPDA 2020

Demand is translated into land requirements by applying average Floor Space Ratios (FSRs) to the net increase in floorspace between 2019 and 2041. Of the around 780.8 hectares of employment precinct zoned land currently within Campbelltown LGA, it is estimated that around 680.6 hectares is developed. On this land, just over 2.9 million square metres of employment floorspace is provided, equating to an average developable FSR of around 0.42:1 across the precincts. To accurately assess the likely demand for additional lands stocks, three developable FSR scenarios were applied, including 0.5:1, 0.75:1 and 1:1. The vacant land stock was also taken into consideration. At the LGA level, after factoring in vacant land, the capacity assessment found that:

- Scenario 1: Under the 0.5:1 developable FSR scenario: there would be an undersupply of employment precinct land of between 112 to 284 hectares
- Scenario 2: Under the 0.75:1 developable FSR scenario: there would be an undersupply of employment land of between 50 to 165 hectares
- Scenario 3: Under the 1:1 developable FSR scenario: there would be an undersupply of employment land of between 19 to 105 hectares.

Taking a conservative approach of the highest scenario (scenario 1) results and allowing for 20% of any new employment precinct to be taken up by other non-employment uses (i.e. roads) between an additional **206 and 355 hectares** would be appropriate to be planned for to accommodate the projected demand. The current provision of zoned employment land is not adequate to meet future demand requirements. Furthermore, any employment land converted to residential uses would add to this overall shortage in employment land.

Increasing the developable densities within existing employment precincts would assist in meeting some of this demand, however it is unlikely that all demand will be able to be met in the existing zoned employment land. The supply deficit of employment land in the LGA would reach critical levels if land along the Glenfield to Macarthur Corridor was rezoned for other uses. Identifying and protecting new employment precincts in the LGA would be encouraged to help retain the LGA's competitive advantage. Land in the Greater Macarthur area is a logical investigation area for accommodating some of the future demand. Where there is a shortage, surrounding LGA's, such as Wollondilly and Camden, may need to take up some of the demand.

2.7 Strategies and actions

2.7.1 Strategy: Promote the competitive advantage of Campbelltown LGA

Western Sydney is a competitive environment with new industrial land and development continually entering the market. There is a need to promote Campbelltown as the place to invest, to secure jobs in the LGA closer to homes. Campbelltown LGA is already well-positioned to leverage its strong transport infrastructure connections and existing primary and growth industries of manufacturing and transport, postal and warehousing.

Unlike other business forms, industrial and specialised retail development is generally purpose-built and requires fast turnaround times to secure tenancies.

- **Action:** Implement the actions identified in the Campbelltown Economic Development Strategy that promote investment and employment opportunities in the LGA.
- **Action:** Work closely with large industrial proponents to identify and address expectations and potential development issues early and then fast-track industrial development applications to bring supply online quickly and enhance development interest.
- **Action:** Seek to reinforce a competitive advantage and the economic significance of Ingleburn and Minto industrial precincts by enabling the opportunity for 24/7 operation, where unlikely to affect the amenity of sensitive receivers.

2.7.2 Strategy: Deliver a sustainable pipeline of land for employment precincts.

Section 2.6 found that there is a need for between 206ha and 355ha of employment land to serve the future population requirements. This would be distributed across industrial and business development zones with the greatest demand for industrial zoning.

As identified in 2.6, there is currently insufficient land available to accommodate future employment precinct demand. While enhanced utilisation of employment precincts can occur (see Strategy 2.7.3), delivering a pipeline of greenfield employment precincts is required to reduce the risk of inflating rents and land values, and to be able to continue providing jobs and economic productivity within the LGA.

A review of the Greater Macarthur Structure Plan 2040 (land release areas) does not highlight any additional opportunities for future employment land, despite significant residential development proposed to occur in this area. Ideally, to encourage jobs close to homes, some provision of B5 Business Development Land, IN2 Light Industry and IN1 General Industry should be accommodated within future growth areas south of Campbelltown.

- **Action:** Advise State Government of the findings of this study and the anticipated shortage of land for employment precincts. Request that they consider opportunities for employment precincts during any future Greater Macarthur Structure Plan amendments.
- **Action:** Explore opportunities to enter into public-private partnerships, for early infrastructure delivery, with developers that are seeking to deliver new employment lands (particularly IN1 General Industrial, IN2 Light Industrial or B5 Business Development). Upfront infrastructure delivery may bring more employment land on to the market quickly.
- **Action:** Consider working with the State Government to develop and publish a priority infrastructure delivery program that identifies the locations that will be the focus of infrastructure planning and delivery and the anticipated timeframes. Locations that can deliver a greater number of jobs and economic contribution should be prioritised first.
- **Action:** Review contribution plans to capture the costs of infrastructure improvement works and community facilities in employment precincts.

- **Action:** As a priority, investigate ‘urban capable’ land (see Figure 6) in South Campbelltown to accommodate a diversity of industrial, urban service and specialised retail land. Locations closer to the Hume Highway are the most appropriate for employment precincts.

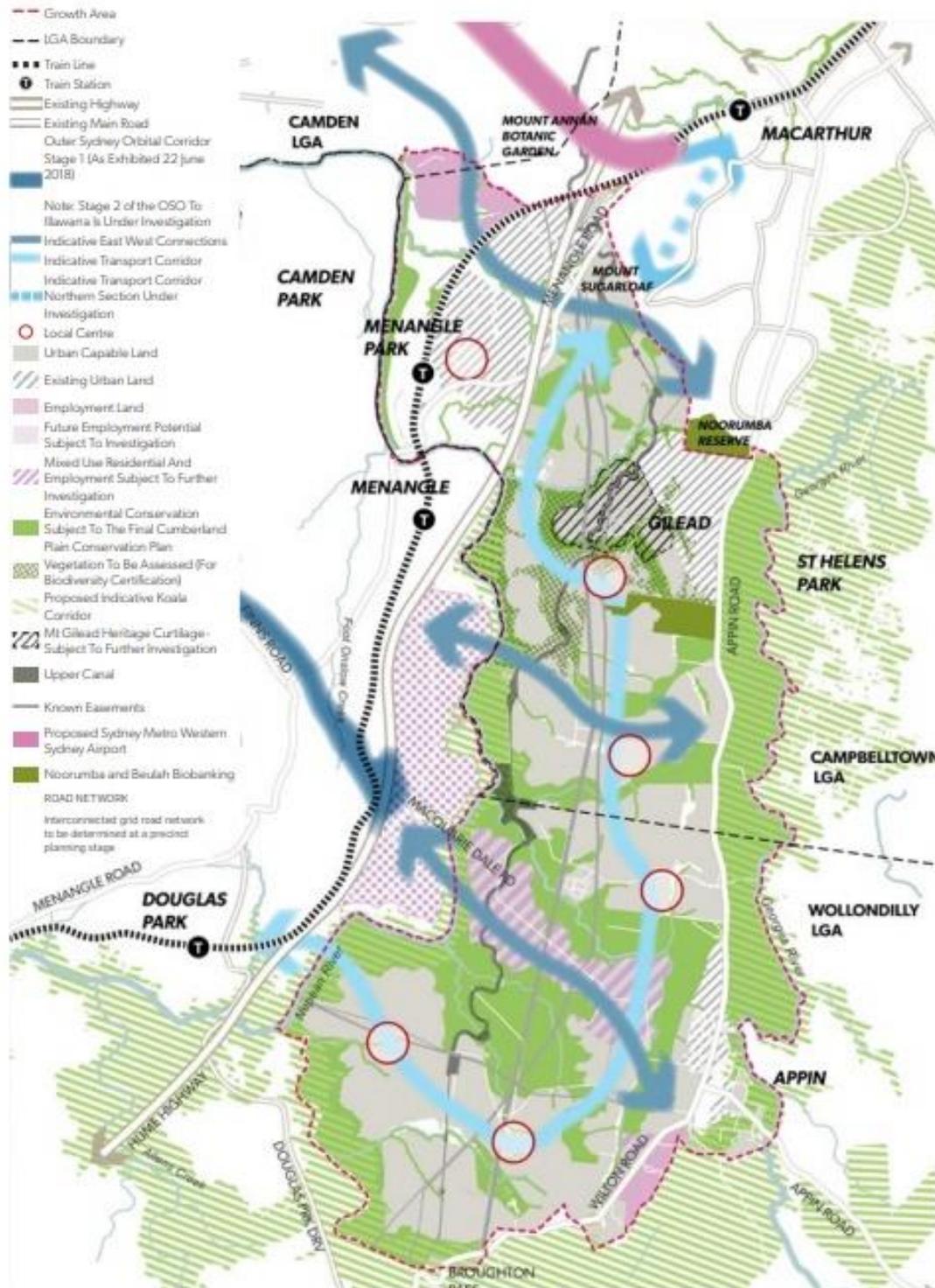


Figure 6: Greater Macarthur Structure Plan (land release area)

Source: NSW Government 2018



2.7.3 Strategy: Increase the capacity of existing employment precincts

To respond to changing industry requirements and to reduce non-compliance issues associated with planning controls, more flexible planning controls could be considered to increase density and allow greater floorspace and redevelopment outcomes. A review of surrounding industrial areas at Prestons, Moorebank/Chipping Norton and Wetherill Park have shown higher height limits between 15 m and 30 m, or no height limit. FSRs are generally not imposed. This puts Campbelltown industrial lands at a disadvantage, limiting the ability for businesses with larger built form requirements to locate in Campbelltown. Industry consultation identified several controls that could be revisited to enhance the utilisation of employment precincts. This included amending the current building height to 19m (currently 12m), reviewing the setbacks and reviewing car parking controls.

- **Action:** Consider removing building height controls from the industrial precinct and protecting the character and sightlines through specific provisions in the DCP, if required. This would enable new forms of industrial development, such as multi-storey and high-bay warehousing, and design solutions to be achieved.
- **Action:** Consider amending the DCP to add greater flexibility around parking rates by applying a merit-based assessment rather than hypothetical future uses assessment. Strict numerical controls (eg 1 space per 300sqm of warehouse) should be set aside in favour of an assessment of average staff and visitor requirements of similar types of development. This information could be provided as part of a development specific traffic impact assessment.
- **Action:** To provide more flexibility for employment uses in the IN2 Light Industrial and B5 Business Development zone, consider amending the approach to the Local Environmental Plan Land Use Tables to be open rather than closed i.e. listing prohibited uses and then enabling other uses to be permitted with consent.
- **Action:** Strict numerical controls relating to setbacks should be reviewed to encourage:
 - Small setbacks that provide meaningful landscaping that contributes to the urban canopy
 - Pedestrian access and amenity, particularly in areas close to train stations such as Minto, Campbelltown, Leumeah and Ingleburn.

2.7.4 Strategy: Retain employment precincts along the Glenfield to Macarthur Renewal Corridor at Ingleburn, Minto and Campbelltown

The employment precincts around Campbelltown’s electrified train stations are identified in the Glenfield to Macarthur Land Use and Infrastructure Implementation Plan for higher-order business, and in some instances, residential uses. At present, the employment precincts are high functioning industrial areas with increasing demand. While higher-order uses (such as residential and business) may be desirable around the rail stations in the longer term, beyond 2041, the demand modelling suggests that the current centres, primarily to the east of the railway, offer sufficient residential supply and expansion opportunity to accommodate projected growth without encroaching on the industrial land. Retaining the current industrial zoned land would enable the continued utilisation and economic productivity of the employment precincts. Therefore, it is recommended that:

- **Action:** Noting the sufficient residential capacity identified in the Campbelltown Local Housing Strategy 2020, existing employment zones at Minto, Ingleburn and Campbelltown should be protected from residential development.
- **Action:** Postpone rezoning of employment precincts until the renewal of eastern centres has come to fruition, and there is adequate demand to support the rezoning to align with the Glenfield to Macarthur Land Use and Infrastructure Implementation Plan. In particular, industrial areas around Ingleburn and Minto should be protected. A future review of these areas can be undertaken once residential supply on the eastern side of the railway has been established, and a future employment land review is conducted.

Industrial use – Aero Road Ingleburn



2.7.5 Strategy: Define a clear future role and function of Maryfields

The B7 Business Park zone was introduced to the CLEP2015 in mid 2018, anticipated to deliver 50,000 to 60,000 sqm of office space and supporting uses at Maryfields. While there is a benefit in delivering some large floorplate office opportunities in the business park, it would be desirable for most office development to be located in the CBD to enhance the viability of the centre and support revitalisation. It is noted that the fragmented nature of the CBD at present does limit this opportunity, however, in line with the Reimagining Campbelltown City Centre Masterplan, there may be future opportunities for large format office floorspace.

The Campbelltown LSPS seeks to investigate opportunities for creative industries, indigenous business hub, smart work hubs and an agribusiness science cluster. The B7 Business Park zone could create capacity for such a space in a high amenity, integrated precinct.

There is evidence across NSW, that live-work establishments can provide affordable options for new businesses and creative industries. While acknowledging the different setting, there is an example in Byron LGA that produces a successful live-work and office environment that has been successfully received by the market (see <https://www.habitatbyronbay.com/>). Considering the scenic amenity of the surroundings, and the strong transport connections, a similar style product could be delivered in Campbelltown.

Option 1: Incentivise development for employment uses

- **Action:** Consider potentially investigating and attracting a developer to deliver a similar product outcome to that achieved at Habitat Byron. This would be a ‘point of difference’ product type that could appeal to new businesses and encourage home-based businesses to move to an employment precinct. It would provide a low rise – workshop/office and SOHO living product. The intent of the product is not to incorporate retail uses, rather a mix of creative and business uses that do not compete with the nearby centres. An employment component must be attached to each dwelling.
- **Action:** Investigate a partnership and potentially seek a grant to develop a state-of-the-art innovation and research centre within the B7 Business Park precinct.

Option 2: Retain the site for long term prospects

- **Action:** Retain the current planning controls on the site to preserve the capacity of the site to accommodate larger format office space.

2.7.6 Strategy: Define a clear future role and function for the Deferred Matter Land at Campbelltown

Land immediately to the west of Campbelltown CBD (see Figure 7) is a Deferred Matter, zoned 4(b) Industrial under the Campbelltown (Urban Area) LEP 2002. Council currently owns a proportion of this land is interested in establishing a clear planning framework for the location. Reimagining Campbelltown City Centre Masterplan suggests that this land could serve as a Tech and City Innovation precinct centred on the Bow Bowing Creek amenity spine. The property is well located in proximity to the Campbelltown rail station and the health and education precinct and could provide a high amenity commercial outcome for businesses or a mixed zone outcome that enables both a business park and an extension of the existing Blaxland Road large format retail precinct. The underlying objective for the area would be to provide an outcome that enables the delivery of uses that would not detract from the renewal and enhancement of Campbelltown CBD to the east of the rail line. Option 1 aligns best with the vision established in Reimagining Campbelltown 2020 for the area to transition to a Tech and City Innovation precinct.

Action: Investigate the three land use options for the land at Campbelltown as follows:

Option 1: High Amenity Business Tech Park

A B7 Business Park precinct zone would enable the site to be transitioned and deliver commercial employment uses in a high amenity environment. This zone would be complementary to the CBD and would enable a mix of

uses including business and office premises, light industries and small bars and pubs. Specialised retail and residential would not be permissible within the area. There is a risk that a B7 Business Park zone would detract from potential office space being delivered in the city centre, as there is insufficient demand in the shorter term for both sides to deliver offices. A mix of uses including light industries would however be an appropriate outcome.

Option 2: Extension of Large Format Retail

Blaxland Road is immediately to the north-east of the identified land and is zoned B5 Business Development. Considering the substantial population growth anticipated in the LGA, there is demand for additional large format retail. The land would become a natural extension of Blaxland Road and could provide a mix of warehouse uses, specialised large format retail and light industries. This zone would prevent office premises and residential development being delivered.

Option 3: Light industrial function

As part of the 2020 Campbelltown LEP Review, the land has been rezoned for light industrial uses in line with LEP 2002 4(b) Industrial zone. While there is considerable demand for industrial land in the LGA, an industrial use for the site would not be consistent with the long-term direction set out in Reimagining Campbelltown 2020. The proposed zone would assist in addressing the current shortage of industrial land in the LGA.

Figure 7: Deferred Matter land



Source: Mecone Mosaic 2020

2.7.7 Strategy: Explore synergies with the local TAFE and Universities to develop training and education programs targeted to local industries.

There is an opportunity to facilitate training to equip the workforce with appropriate skills to contribute to industry effectively. Training courses operated by a University or TAFE, aimed at local businesses, can help local businesses improve and grow. The Campbelltown Economic Development Strategy 2020 (EDS 2020) identifies a

number of initiatives to “*build on education, health and industry strengths to upskill the local resident workforce*”. The following actions are to complement those established in the EDS 2020.

- **Action:** Encourage more universities or university outposts to establish in Campbelltown, either in a cluster with WSU or in the Campbelltown CBD.
- **Action:** Review Council’s community assets to determine the opportunity to provide training spaces for utilisation by businesses, universities and TAFE to run training courses.
- **Action:** Work with TAFE and Universities to undertake meaningful engagement with local industries to determine the gap in employment skill sets and tailor training courses to suit.

2.7.8 Strategy: Encourage agglomeration and clustering

Campbelltown LGA already has several precincts that are attracting business agglomeration and clustering, Ingleburn precinct is one such example which has attracted several large transport and logistics industries. Supporting clusters can drive innovation and economic productivity but can also lead to investment attraction from other similar industries if branded correctly. The Campbelltown Economic Development Strategy 2020 (EDS 2020) identifies a number of initiatives to “*better cluster and connect business to achieve economic benefits*”. The following actions are to complement those established in the EDS 2020.

- **Action:** Actively support and market, through Council’s website and collateral, the food processing and distribution cluster opportunity, including provision for large dark stores that are well positioned to distribute to the Greater Sydney, Canberra and the south coast.
- **Action:** Undertake research, explore and invest in opportunities for industrial symbiosis - where the waste or by-products from one business is used as a raw material for another to alleviate costs and encourage more sustainable production.

2.7.9 Strategy: Facilitate greater collaboration and alliances between industry and businesses

Businesses are seeking to form greater partnerships and alliances to establish competitive advantage and agglomeration opportunities. Councils can play an active role in supporting the establishment of alliance and networking opportunities for industry and businesses. The Campbelltown Economic Development Strategy 2020 (EDS 2020) identifies an initiative to “*work with local industry and education institutions to establish an entrepreneurial ecosystem that facilitates and encourages increase local entrepreneurship and business establishment*”. The following actions are to complement those established in the EDS 2020.

- **Action:** Seek to facilitate and encourage a business support program that aims to foster collaboration and connection between industry and business including identifying and providing education pathways and job placements.
- **Action:** Explore opportunities to establish an alliance for the transport and logistics and manufacturing industries to strengthen supply chain synergies and collaboration opportunities.

2.7.10 Strategy: Deliver better places of employment

An increasing number of companies are keen to provide a pleasant working environment for their employees as it helps them to attract and retain talent. Employees like to eat out during meal breaks and have access to basic services such as a childcare, bank or gym, and convenience retail services. Businesses benefit from having services nearby. For example, major corporations prefer to have a hotel or function centre nearby while medium-sized business benefit from services such as printers. The LGA offers a diversity of employment locations. Improving the amenity of employment locations will attract businesses and employers to the LGA. It will also support businesses to attract and retain talent.

- **Action:** Support businesses and workers by ensuring the planning framework encourages:
 - The retention of convenience retail uses (for example shop, kiosk, take-away food and drink) as permissible and limit the size of these uses as detailed in Clause 5.4 of CLEP 2015
 - A pleasant location for people to rest or interact with others during the working day
 - Improved connectivity to surrounding open space (relax during breaks).



Kindergarten adjoining industrial precinct in Blair Athol

2.7.11 Strategy: Protect the role and function of employment lands

The following table provides an overview of the potential future role, function and strategic positioning of employment land within the LGA (refer to Figure 2 for location context).

Table 5: Role and function of employment precincts

Centre name	Zoning	Total land area (ha)	Vacant available land(ha)	Total floorspace (sqm)	Vacant floorspace (sqm)	Future role	Future function and strategic positioning
Campbelltown Blaxland Road	IN2/B5	113.6	4.2	446,754	7,899	District	Continue functioning as a specialise retail, industrial and urban service precinct serving both a local and broader district role.
Maryfields Business Park	B7	6	6.0	-	-	Local	Potential to serve as a research and innovation business park with the opportunity to incorporate live/work arrangements.
Glenfield	IN1	28.7	13.7	400	-	Local	Expansion area for waste service facility or other Council requirements
Glenlee	IN1	28.1	28.7	-	-	Local	Support the rezoning of former coal emplacement site to IN1 General Industry. The function will be to provide industrial and urban service uses to support the growing residential area.
Ingleburn	IN1	316.4	7.2	1,448,004	26,999	Regional	A strategic employment precinct providing high value transport and logistics and manufacturing services to the broader region. Protect for industrial use. Enable some transition to higher-order industrial and business close to the rail station in the longer term and where buffers are proposed.
Leumeah	B5	19.5	3.6	56,846	1,060	Local	Continue to function as a specialised retail and urban service precinct serving the local catchment.
Macquarie Fields	IN2	1.2	0	2,089	-	Local	Continue to operate as a small urban service precinct serving the local catchment.
Menangle Road	B5	1.7	0	-	-	n/a	No buildings and limited future opportunity; recently predominantly rezoned to SP2 – infrastructure by a SEPP. A strategic employment precinct providing high value transport and logistics and manufacturing services to the broader region. Protect for longer-term industrial uses. Enable 24/7 business operation. Enable some longer-term transition to higher-order industrial and business uses close to the rail station around Lincoln Street.
Minto	IN1	256.4	10.5	935,713	17,447	Regional	

A photograph of a Yellow Brick Road business centre storefront. The image is overlaid with a semi-transparent blue filter. A white rectangular box is centered over the storefront, containing the text "BUSINESS CENTRES". The storefront features large glass windows and doors. On the left, a vertical sign lists services: "Home loans", "Financial Advice", "Insurance", "Superannuation", and "Cash & Investments". At the bottom of this sign, the website "ybr.com.au" and phone number "02 4656 2554" are visible. Above the entrance, a sign reads "SHOP 2" and "241". To the right, a sign for "YellowBrickRoad Wealth Management" is visible, featuring a yellow circle with a white 'Y'. Further right, a sign for "Complete Medical Centre" is partially visible. The interior of the business centre is visible through the glass, showing a reception desk and a person in a suit.

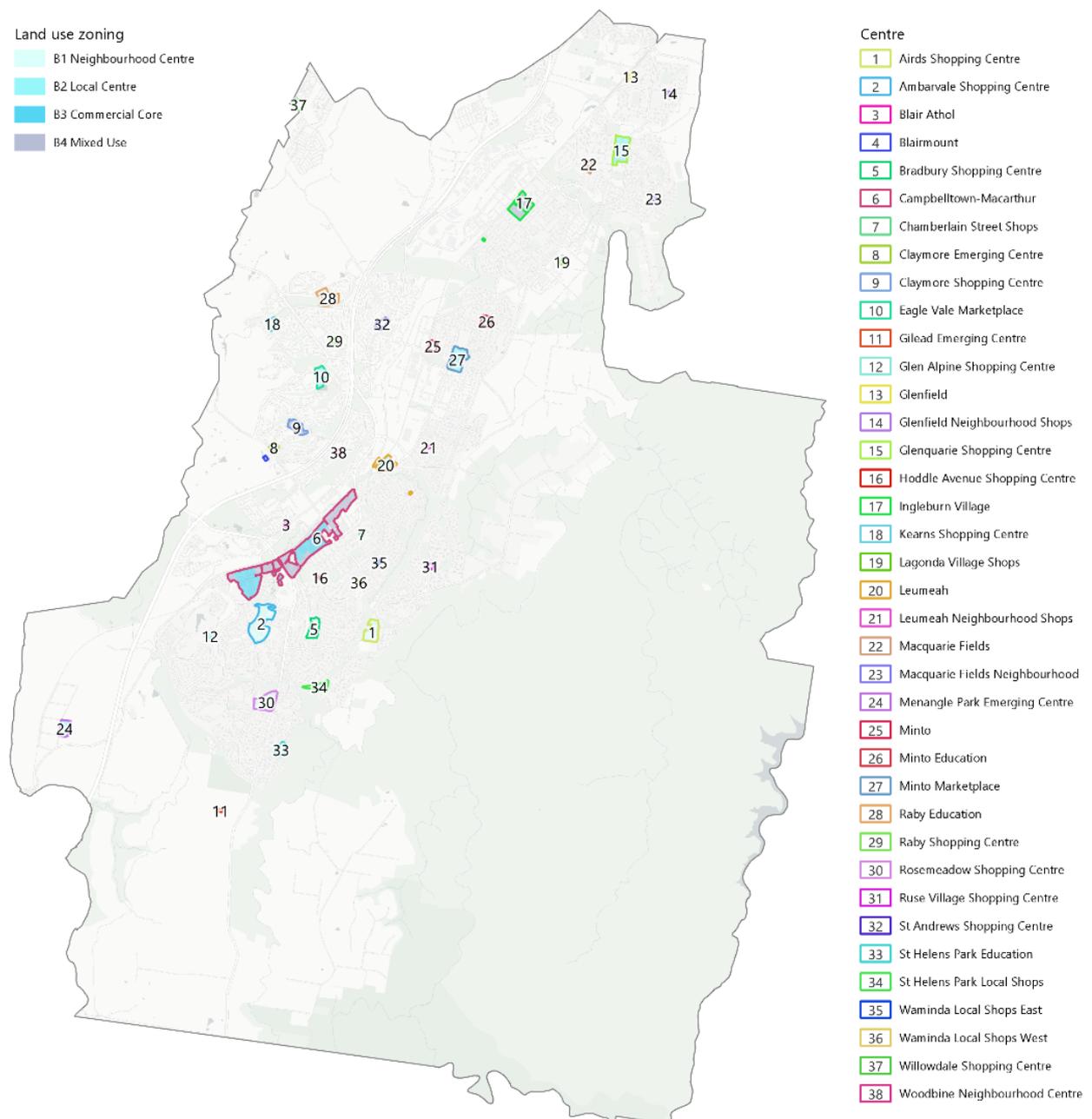
BUSINESS CENTRES

3.0 BUSINESS CENTRES

3.1 Defining business centres

The Campbelltown business centres are identified in Figure 8 and primarily encompass land zoned as B1 Neighbourhood Centre, B2 Local Centre, B2 Commercial Core and B4 Mixed Use. Where there is a reference to ‘education’, it is due to a school being located in the business zone. The centre of Glenfield (no.13 on map) is a Deferred Matter under CLEP 2015 and operates as a 3(c) Neighbourhood Business zone under the Campbelltown (Urban Area) Local Environmental Plan 2002. The LEP review planning proposal, which is nearing finalisation, seeks to convert this to a B2 Local Centre zone under CLEP 2015.

Figure 8: Commercial precincts and zones within Campbelltown LGA



Source: HillPDA 2019 *Note: Bradfield Street Leumeah and Leumeah have been identified as 20.

3.2 Existing land and floor space

39 business centres	260 hectares of land within business centres	874,900 sqm of floor space within business centres
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In 2019, there were 39 business centres located within the Campbelltown LGA. Combined, these centres contained approximately 260 hectares of appropriately zoned land. An overview of land area by centre is provided in Table 6. These land zonings and the amount of land zoned/classified included:

- B1 - Neighbourhood Centre with 97 hectares or 37% of total centres land stock
- B2 - Local Centre with 51.4 hectares or 20% of total centres land stock
- B3 - Commercial Core with 47.7 hectares or 18% of total centres land stock
- B4 - Mixed Use with 59.1 hectares or 23% of total centres land stock
- 3 (c) (subject Campbelltown (Urban Area) LEP 2002) with 4.2 hectares or 2% of total centres land stock.

Of the 39 business centres, 18 centres contained vacant land, equating to around 16 hectares of vacant land in total. The Menangle Park emerging centre, Claymore emerging centre and Gilead emerging centre contained the greatest proportion of vacant land, however viability of these centres is subject to new residential developments occurring in close proximity.

Table 6: Centre zoned land area

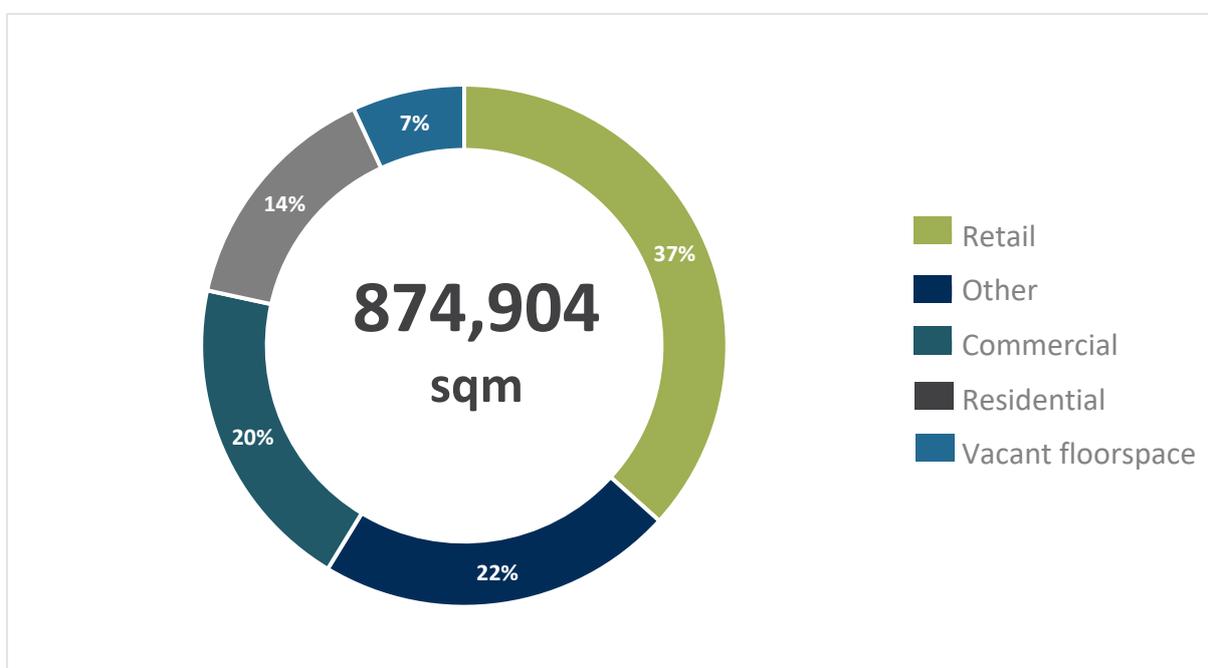
Centre	Zoning	Land area (ha)	Vacant land area (ha)
Airds Shopping Centre	B1	10.0	0.63
Ambarvale Shopping Centre	B1	26.0	1.26*
Blair Athol	B2	0.8	0.00
Blairmount	B1	0.3	0.34
Bradbury Shopping Centre	B1	7.5	0.00
Bradfield Street, Leumeah	B1	0.1	0.00
Campbelltown-Macarthur	B1, B3, B4	88.4	0.99
Chamberlain Street Shops	B1	0.2	0.00
Claymore Shopping Centre	B4	6.1	0.14
Claymore Emerging Centre	B2	2.1	1.80
Eagle Vale Marketplace	B2	7.1	0.14
Gilead Emerging Centre	B1	0.3	0.32
Glen Alpine Shopping Centre	B1	0.2	0.00
Glenfield	DM (3c)	1.0	0.08
Glenfield Neighbourhood Shops	B1	0.2	0.00
Glenquarie Shopping Centre	B2	16.1	0.33
Hoddle Avenue Shopping Centre	B1	0.1	0.00
Ingleburn Village	B1, B4	12.4	0.00
Kearns Shopping Centre	B1	3.7	0.00
Lagonda Village Shops	B1	0.4	0.00
Leumeah Neighbourhood Shops	B1	0.1	0.00
Leumeah (O'Sullivan Road)	B2	7.5	0.74
Macquarie Fields	B1	1.2	0.01
Macquarie Fields Neighbourhood	B1	0.2	0.06
Menangle Park Emerging Centre	B2	6.3	6.31
Minto	B1	2.5	0.00
Minto Education	B1	4.4	0.00
Minto Marketplace	B2	12.3	0.00
Raby Education	B1	10.2	0.35
Raby Shopping Centre	B1	0.8	0.00
Rosemeadow Shopping Centre	B1	13.5	0.00
Ruse Village Shopping Centre	B1	0.9	0.00

Centre	Zoning	Land area (ha)	Vacant land area (ha)
St Andrews Shopping Centre	B1	3.6	0.00
St Helens Park Local Shops	B1	4.6	0.00
St Helens Park Education	B1	4.1	0.78
Waminda Local Shops East	B1	0.2	0.00
Waminda Local Shops West	B1	0.2	0.07
Willowdale Shopping Centre	B2	3.2	2.27
Woodbine Neighbourhood Centre	B1	0.7	0.00
		259.4	16.61

Source: HillPDA, City of Campbelltown *occupied by sporting fields

The 39 commercial centres accommodated around 874,900 square metres of floor space. As can be seen in Figure 9, around 685,960 square metres or 57% was occupied retail and commercial space, 128,508 square metres or 14% was residential related, and 60,432 square metres or 7% was vacant/storage.

Figure 9: Total floorspace by broad land use category



Source: HillPDA land use audit

The following centres contained supermarket space in this category:

- Campbelltown-Macarthur: 23,605 square metres of supermarket space
- Glenquarie Shopping Centre: 8,743 square metres of supermarket space
- Ingleburn Village: 8,393 square metres of supermarket space
- Minto Marketplace: 5,539 square metres of supermarket space
- Eagle Vale Marketplace: 4,306 square metres of supermarket space
- Willowdale Shopping Centre: 4,200 square metres of supermarket space
- Rosemeadow Shopping Centre: 3,669 square metres of supermarket space
- Ambarvale Shopping Centre: 1,729 square metres of supermarket space
- Blair Athol: 1,645 square metres of supermarket space
- Raby Tavern: 1,000 square metres of supermarket space.

3.3 Job distribution

The Campbelltown LGA centres generate employment opportunities for around 24,770 people across various industries. Around 60 per cent of these jobs are concentrated in the Campbelltown-Macarthur centre. Ingleburn (9%), Glenquarie (5%) and Minto Marketplace contain the next highest proportion of jobs. The estimated breakdown of jobs across the centres is identified in Table 7 below:

Table 7: Estimated breakdown of existing jobs across business centres

Centre	Estimate jobs
Airds Shopping Centre	329
Ambarvale Shopping Centre	443
Blair Athol	66
Blairmount	0
Bradbury Shopping Centre	479
Bradfield Street, Leumeah	25
Campbelltown-Macarthur	14,574
Chamberlain Street Shops	38
Claymore Shopping Centre	182
Claymore Emerging Centre	11
Eagle Vale Marketplace	402
Gilead Emerging Centre	0
Glen Alpine Shopping Centre	39
Glenfield	163
Glenquarie Shopping Centre	1,220
Glenfield Neighbourhood Shops	21
Hoddle Avenue Shopping Centre	18
Ingleburn Village	2,347
Kearns Shopping Centre	137
Lagonda Village Shops	35
Leumeah Neighbourhood Shops	12
Leumeah (O'Sullivan Road)	391
Macquarie Fields Neighbourhood	6
Macquarie Fields	283
Menangle Park Emerging Centre	0
Minto	407
Minto Education	208
Minto Marketplace	1,193
Raby Education	227
Raby Shopping Centre	141
Rosemeadow Shopping Centre	537
Ruse Village Shopping Centre,	91
St Andrews Shopping Centre	247
St Helens Park Local Shops	112
St Helens Park Education	74
Waminda Local Shops East	47
Waminda Local Shops West	20
Willowdale Shopping Centre	229
Woodbine Neighbourhood Centre	13
TOTAL	24,767

Source: HillPDA 2020

The largest contributing sectors include:

- Commercial – government (12%)
- Retail – supermarket / grocery store (11%)
- Retail – Café, restaurant, takeaway (11%)
- Commercial – medical (10%)
- Other – education (9%)



3.4 Centre market trends

The demand for retail and business floorspace is influenced by trends such as globalisation and the use of information technology. Table 8 explores some of the broader market trends being seen across the retail, business and office sector and associated implications for Campbelltown.

Table 8: Centre precinct market trends

Broad market trends	Implications for Campbelltown
<p>Demand for supermarket and grocery stores will continue to experience strong growth in the coming years, with the possible provision of neighbourhood supermarkets in smaller centres around Campbelltown LGA. This is consistent with the Regional Plan intent to improve access to supermarkets and services to enhance liveability for residents.</p>	<p>Emerging centres in growing residential areas such as Menangle Park and Gilead would be appropriate to accommodate new supermarkets.</p> <p>Out-of-centre, standalone supermarkets should generally be discouraged to prevent undermining the viability of existing centres.</p>
<p>The growth in the café and entertainment culture will emerge with demand for new cafés, restaurants, bars and entertainment activities. As residential communities continue to grow, residents will demand more lifestyle and social opportunities.</p>	<p>Improving the amenity in business centres can assist in encouraging an improved day and night time economy, providing residents and workers with greater options for socialising and connecting.</p>
<p>Department stores have been retracting as they compete with online retailing. There may be an emergence of smaller department stores that provide specific products tailored to the surrounding demographic. Existing department stores will continue to consolidate, evolving and innovating to reflect the changing trends in shopper preferences and habits.</p>	<p>The traditional local centres, underpinned by supermarkets and department stores, may need to transition and adapt to remain viable. This may introduce new and emerging retail opportunities, tailored to the residential market, into the LGA.</p>
<p>The growth of online retail is expanding the opportunity for smaller boutique or home-based retailers and manufacturers to produce and distribute product to a wider, more viable market.</p> <p>Start-ups have great disruptive potential because of the ease with which they can reach global audiences through the use of technology. Co-working spaces and technology incubators are also emerging across all regions. This is generating less demand for large floor plate office, with more flexible options preferred.</p>	<p>Opportunity to support start-up businesses through small business and manufacturing hubs within business and employment precincts. Small business support programs and events facilitated by the Council can also assist start-up businesses to grow.</p>
<p>Remote working will drive up demand for shared facilities and co-working spaces as people choose to remain local rather than travelling to Sydney CBD or other major employment centres.</p>	<p>Creating an opportunity for more business hubs and co-working spaces in centres may support the viability of other uses, including boosting trade and expenditure.</p>
<p>Increasing demand for residential uses in centres due to affordability and changing lifestyle preferences. While it is important to protect commercial floor space provision, introducing residential uses can help support the viability of centres and boost business vibrancy and revenue. Centres in close proximity to good public transport services are more likely to experience the benefits of this change.</p>	<p>Consider increasing residential development within walkable catchments of local centres where it can be done so without reducing the net amount of commercial floorspace. Centres along the Glenfield to Macarthur rail corridor would be most appropriate for increased residential density through mixed-use or standalone residential developments.</p>

3.5 Future centres demand

3.5.1 Retail and business

The forecast demand for retail space by centre was derived using resident and worker expenditure modelling. Two scenarios were undertaken: one based on the Forecast Id. population projections and the other based on the TPA/DPIE projections and distribution. The two scenarios indicated demand for between 146,200sqm to 228,700sqm by 2041. The estimated net increase in floor space across the centres under the Forecast Id scenario is outlined in Table 9.

Table 9: Forecast Id scenario demand and supply of retail floor space by centre (sqm)

Centre	Supply in 2019	Demand in 2019	Current over/under-supply	Additional demand in 2031	Additional demand in 2041
Campbelltown	165,120	159,623	-5,497	73,566	106,742
Ingleburn	22,515	16,428	-6,087	0	0
Macquarie Fields	15,606	16,149	543	5,995	9,355
Glenfield	2,277	5,758	3,481	11,160	16,025
Minto	27,261	23,109	-4,152	0	284
Claymore & Eagle Vale	6,527	10,591	4,064	8,238	10,170
Rosemeadow	6,193	11,912	5,719	7,800	8,955
Denham Court	5,045	635	-4,410	5,988	6,963
Menangle Park	0	207	207	9,474	9,719
Gilead	0	2,115	2,115	18,911	48,482
Leumeah	1,658	3,200	1,542	2,029	2,460
OTHER	29,129	19,671	-9,458	1,204	9,572
TOTAL	281,331	269,398	-11,933	144,365	228,728

Source: HillPDA 2020

As shown in the above table, under the Forecast Id scenario a significant increase in supply should be planned for in the centres of Campbelltown CBD (107,000sqm more), Claymore and Eagle Vale (10,000sqm) and Glenfield (16,000sqm). New centres should be planned for in Menangle Park and Gilead. Gilead, in particular, could justify having 3 or 4 new centres to service its population of 55,000 or more. Conversely, under the TPA Scenario (see Table 10), the amount of retail space required across the LGA reduces, however, the general principles in terms of where growth and new centres should be directed, generally remains consistent.

Table 10: TPA scenario forecast demand and supply of retail floorspace by 2041 by centre (sqm)

Centre	Supply in 2019	Demand in 2019	Current under-supply	Additional demand in 2031	Additional demand in 2041
Campbelltown	165,120	159,623	-5,497	50,821	77,548
Ingleburn	22,515	16,428	-6,087	-574	3,176
Macquarie Fields	15,606	16,149	543	4,010	7,000
Glenfield	2,277	5,758	3,481	6,917	10,169
Minto	27,261	23,109	-4,152	-255	4,080
Claymore & Eagle Vale	6,527	10,591	4,064	6,873	9,791
Rosemeadow	6,193	11,912	5,719	7,752	10,625
Denham Court	5,045	635	-4,410	-1,705	-1,119
Menangle Park	0	207	207	4,583	6,352
Gilead	0	2,115	2,115	6,518	11,259
Leumeah	1,658	3,200	1,542	2,171	2,944
OTHER	29,129	19,671	-9,458	-2,233	4,340
TOTAL	281,331	269,398	-11,933	84,878	146,165

Source: HillPDA 2020

To note, some of the demand could shift between centres. The construction of a new centre could shift demand away from an existing centre, and so the above tables should only be used as a guide to gauge approximately where retail space should be planned.

3.5.2 Office

The forecast for office floorspace was derived using the TPA and Forecast Id. population projections, assuming an average of 25m² per worker (GFA) and a target of 5 per cent vacancy in the commercial centres. The three scenarios tested, and their results are as follows:

1. **TPA scenario:** The TPA scenario adopts Transport for NSW 2016 employment forecasts. This is considered a low projection because the rate of growth (37% more workers from 2016 to 2041) is lower than the rate of population growth forecast by Transport for NSW (55% more residents). Transport for NSW is forecasting the ratio of jobs to the population to decline from 35% to 31% over that period

Results: An additional 5,180 office jobs would be provided in the commercial centres. This would require a further 136,000m² of additional office space to keep up with demand.

2. **TPA 35 scenario forecast:** The TPA 35 scenario adopts the same forecast from Transport for NSW but pro-rates the job numbers across all industry types upwards to maintain the ratio of jobs to the population at 35%.

Results: An additional 7,340 office jobs would be provided in the commercial centres. This would result in the need for an additional 193,000sqm of office space by 2041.

3. **Forecast Id scenario:** The forecast id scenario maintains the 35% ratio but adopts the higher Forecast.ID population projection.

Results: An additional 10,840 jobs would be provided in the commercial centres resulting in the need for a further 285,000sqm of office space by 2041.

The distribution of office space to the centres was assessed having regard to the following:

- The existing distribution and relative sizes of the existing centres^[1]
- Likely new centres and the level of retail space required in them as determined above
- The relative current and likely future market appetite to provide future office space between the competing centres.

Having regard to the above a suggested distribution of office space under each of the three scenarios is provided in Table 11.

Table 11: Forecast demand for additional office space by centre to 2041 (sqm)

Centre	TPA forecast	TPA35 forecast	Forecast id forecast
Campbelltown	93,500	138,000	204,000
Ingleburn	0	0	0
Macquarie Fields	5,000	7,000	11,000
Glenfield	7,000	10,500	16,000
Minto	0	0	0
Eagle Vale	2,500	3,500	5,500
Rosemeadow	2,500	3,500	5,500
Denham Court	0	0	0
Menangle Park	2,500	3,500	5,500
Gilead	3,500	5,500	13,500
Leumeah	2,500	3,500	5,500
Other	1,000	2,000	2,500
TOTAL	120,000	177,000	269,000

^[1] Generally, office space is more attracted to larger centres. In smaller retail centres of say 30,000sqm or less the component of non-retail businesses generally comprises around 20% to 30% of total commercial floor space. The percentage is lower in stand alone shopping centres (generally 5% to 10%). However, in large commercial centres with multiple office buildings the percentage may be 70% or more.

3.6 Centre capacity

An assessment has been undertaken to determine the theoretical capacity of centres to accommodate future demand. This then determines the centres that may need further planning intervention to accommodate growth.

The capacity for each centre to achieve its projected demand has been calculated by firstly estimating the amount of floorspace that a centre can achieve within its business zoned land, under its current planning controls (referred to a centres' maximum theoretical capacity). This maximum theoretical capacity is then subtracted from the projected demand identified in Section 3.5.

Usually, the maximum theoretical capacity of a centre is calculated by applying a lot or parcel of lands identified Floor Space Ratio (FSR) by its land area. For example, a 1,000sqm site with an FSR of 1:1 can yield 1,000sqm of floorspace (1,000sqm X 1 = 1,000sqm) while the same size site with an FSR of 0.5:1 could theoretically yield 500sqm (1,000sqm X 0.5 = 500sqm).

Currently, Campbelltown LEP 2015 does not identify FSRs for its commercial centres, however, for the purpose of this strategy, we have assessed the capacity of each centre to accommodate its projected demand under two capacity scenarios, these being:

- **Ground floor scenario** | assumes that a centres ground floor is occupied by non-residential uses, that is commercial, and retail uses. As such, this scenario applies an FSR of 0.5:1 to each business zoned lot/parcel of land within a centres business zoned land. Open space lots/parcels of land, like parks and playgrounds land, are excluded from capacity calculations.
- **Ground and first floor scenario** | assume that a centres ground and first floors are occupied by non-residential uses, that is commercial, and retail uses. As such this scenario applies an FSR of 1:1 to each business zoned lot/parcel of land within a centres business zoned land. Open space lots/parcels of land, like parks and playgrounds land, are excluded from capacity calculations.

In addition to open space and playgrounds, heritage, Macarthur Square, Campbelltown Mall and residential flat buildings have also been excluded from Campbelltown's capacity calculations under each capacity scenario.

As the capacity scenarios assume total redevelopment of a centre, these estimates are considered high. They do not consider the feasibility of redevelopment or take-up by the market. As such, further analysis of a centre by centre or site by site case should be undertaken to take these considerations into account.

Table 12 outlines the findings from the centre capacity assessment. What the high level analysis identifies is that the centres of Campbelltown, Ingleburn, Macquarie Fields, Glenfield, Minto and Leumeah will need to consider incorporating a non-residential planning mechanism in order to meet future demand. In the case of Ingleburn, Minto and Leumeah, it is unlikely that a ground floor only solution will be appropriate, however a centre wide ground and first floor outcome is not required. This is consistent with the planning proposals for Minto and Ingleburn CBD.

In the case of Campbelltown CBD, a ground and first floor outcome would not be sufficient. Instead, a 'commercial core' that established a higher minimum non-residential component is recommended.

The current provision on zoned land at Macquarie Fields and Glenfield is unlikely to be sufficient to accommodate future demand. The exact size of these precincts would need to be further investigated through demand, design and feasibility testing. Gilead is likely to require a number of new centres to be released to meet future demand. If this occurs, ground floor only provision of space is expected to be sufficient.

Table 12: Centre capacity assessment by demand and capacity scenario

Centre	Non-residential capacity by capacity scenario		Total demand by scenario*		Over/undersupply - Ground floor capacity scenario		Over/undersupply - Ground & first floor capacity scenario	
	Ground (a)	Ground and first floor (b)	TPA (c)	Forecast id (d)	TPA (e=a-c)	Forecast id (f=a-d)	TPA (g=b-d)	Forecast id (h=b-d)
Campbelltown	252,708	505,416	571,504	676,218	-318,796	-423,510	-66,088	-170,802
Ingleburn	60,848	121,697	73,109	69,615	-12,260	-8,767	48,588	52,082
Macquarie Fields	5,863	11,726	21,819	28,809	-15,956	-22,946	-10,093	-17,084
Glenfield	4,973	9,945	27,931	40,423	-22,958	-35,450	-17,986	-30,477
Minto	12,700	25,401	19,687	15,511	-6,987	-2,811	5,714	9,889
Claymore & Eagle Vale	66,284	132,567	39,465	42,082	26,819	24,202	93,103	90,486
Rosemeadow	64,049	128,098	34,816	35,179	29,233	28,870	93,283	92,920
Denham Court	16,203	32,406	4,214	13,104	11,989	3,098	28,191	19,301
Menangle Park	31,556	63,113	10,837	16,741	20,719	14,815	52,276	46,372
Gilead	1,594	3,188	18,435	68,180	-16,841	-66,586	-15,247	-64,992
Leumeah	37,376	74,752	48,759	50,427	-11,383	-13,050	25,994	24,326
Other	390,182	780,365	201,368	207,673	188,814	182,509	578,997	572,691
Total	944,337	1,888,674	1,071,944	1,263,962	-127,607	-319,625	816,730	624,712

Source: HillPDA, *includes an additional 10% to the projected demand to translate NSA into GFA



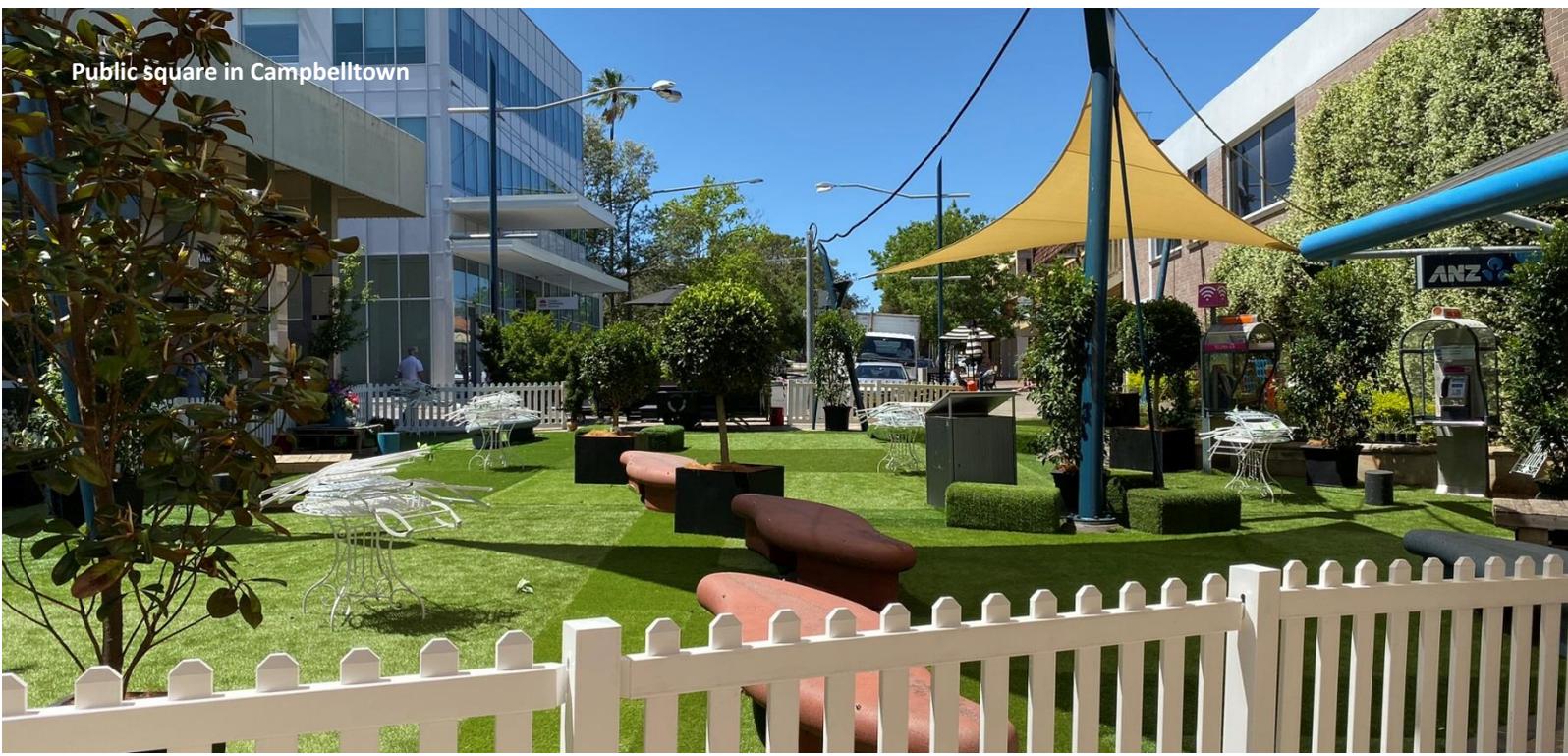
Macquarie Fields Neighbourhood Shops

3.7 Additional guiding principles

In addition to the guiding principles identified in section 2.5, there are some specific principles to centres that should be considered when planning for future supply. The following principles should be considered when revitalising existing centres or planning for new centres.

Principle	Rationale
Secure a long term supply of commercial floorspace	Protecting commercial floorspace for future use is essential for securing jobs close to homes, maintaining the viability of the centre and stimulating the daytime retail economy.
Seek diversity in the type of uses and size of floorplates	The quality and diversity of the tenancy mix can define the identity and desirability of a centre, creating an attractive place to do business and visit. The variety of floorplates can assist in enabling a stronger use mix. A centre should cater to the daily and weekly needs of residents and workers, specialise in a dining and/or boutique retailing element and should provide social gathering opportunities. This encourages workers, residents and visitors to stay and spend in the centre longer.
Support activity clusters to foster unique identity	Supporting the growth of both day and night time activity level creates a more vibrant and safe environment. Extending trading hours past the standard '9-5' concept enhances consumer access to goods and services and the trading opportunity for businesses.
Encourage active street frontages	Active street frontages can increase the perceived vibrancy of a centre and optimise surveillance. When commercial floorspace is over-delivered, however, tenancies can be left vacant, having the opposite effect. Exploring innovative use-mix and design options can produce a safer and more desirable public domain.
Reduce vacancy rates in centres	Centre trading performance can be measured by the extent of vacancy, turnover and the quality of the use mix. High vacancy rates or high turnover of tenants can indicate that a centre is underperforming. A rise in vacancy rates indicates an increase in available floorspace with supply outstripping demand. Rents become more competitive to attract new businesses. Low vacancy rates generally indicate floorspace in the centre is in demand, with rents generally increasing the lower the vacancy rate falls. Vacancy rates can also be influenced by the strength and supply of similar stock in other markets.
Increase density within a walkable catchment	Centre performance is intrinsically linked to the density within the trade catchment. Increasing the residential and commercial density of the walkable catchment can enhance the vitality of retail and reduces the reliance on private vehicle trips. A balance of both commercial and residential can extend centre activation both during the day and in the evening.

Principle	Rationale
Pedestrian-friendly and oriented spaces	Walkable main streets and a pedestrian prioritised traffic environment can be more conducive to passing pedestrian trade and correlate with increased sales. Restructure the urban environment to prioritise pedestrian movement, and activity spines along key desire lines, such as to major anchors and transport nodes can also improve the viability of centres.
Available and convenient parking	On-street and convenient parking is imperative to the function of businesses that have a higher dependency on passing trade. The presence of easy to see and accessible parking spaces enables customers to conveniently and efficiently arrive, use and depart the centre. On-street parking also assists in traffic calming as it forces other vehicles to slow down and creates a positive barrier between the street and pedestrian uses.
Provide safe through block linkages	Enhancing the legibility and pedestrian movement capacity within a centre improves convenience for patrons and enhances the pedestrian experience. Creating pedestrian connections that respond to consumer desire lines and reduce the bulk of blocks can increase patronage and the appeal of the centre.
Efficient servicing and deliveries	Servicing and delivery are imperative to the daily operation of some businesses. Ensuring the efficiency of services and deliveries is retained and is in a location that reduces impacts to the public realm is important.
Integrate passive open space and recreation options	Useful and attractive green and public spaces enhance the public domain and create break out areas for workers, residents and visitors to the centre. These passive spaces enhance the amenity of the environment and can be used for other purposes, such as public markets and events. Tenancies fronting the public spaces also receive extra benefits in terms of enhanced foot traffic and potential passing trade.
Integrate community facilities	The adequate provision of community facilities can contribute significantly to improving the lives of residents, workers and visitors to a centre. Community facilities are uniquely placed to play a strong role in a centre, acting as intergenerational facilities to encourage interaction and enhanced community cohesion or providing for the day to day needs of a local community.
Desirable centre amenity	<p>The local character and amenity of a place can affect the enjoyment and desirability of the environment, visitation numbers and trends, and consequently the economic activity of a commercial centre and the businesses located there.</p> <p>Amenity is generally associated with the pleasantness of an area or business environment but also has a physical (or tangible) component. This includes the character and appearance of buildings, proximity to commercial or recreational facilities, quality infrastructure and absence of noise, unsightliness or offensive odours. It also has a psychological or social component. Improving pedestrian experience can increase centre visitation and attract further investment. Pleasant amenity creates more memorable experiences and repeat visitation.</p>



Public square in Campbelltown

3.8 Strategies and actions

3.8.1 Strategy: Establish and reinforce a clear centre hierarchy across the LGA

Establish a clear centre hierarchy that provides clarity to the market around growth expectations and the desired role and function of centres. The hierarchy will serve to reinforce the commercial significance of the Campbelltown-Macarthur metropolitan cluster is providing significant and diverse employment and economic contribution to the LGA. It has regard to the position of centres in the context of the broader district and regional centres hierarchy. The role of other centres is to support, rather than compete with, the primary role of the metropolitan cluster, providing local job opportunities and services to support the weekly and daily needs of residents.

- **Action:** Based on the findings in the Background Report, and to better conform to the Greater Sydney Commission’s commercial centre classifications, consider adopting the proposed hierarchy outlined below and in Table 11 and Figure 10.

- **Metropolitan Cluster** – Metropolitan cluster is the highest order centre in Campbelltown LGA, containing major health, education, retail, community and civic services for the broader region. A metropolitan cluster is a significant employment and economic generator with a wide catchment.

Relevant centres: Campbelltown-Macarthur

- **Local centre** – Local centres provide essential access to day to day goods and services close to where people live. They typically are located in proximity to public transport and transport interchanges increasing their access to for the surrounding community. Local centres provide a mix of retail, commercial and community space with retail space typically being anchored by one or two supermarkets over 1,000sqm.

Relevant centres: Ambarvale Shopping Centre, Blair Athol, Eagle Vale Marketplace, Glenfield, Glenquarie Shopping Centre, Ingleburn Village, Minto Marketplace, Raby Shopping Centre, Rosemeadow Shopping Centre and Willowdale Shopping Centre

- **Neighbourhood centre** – neighbourhood centres provide retail, community facilities, and other population supportive services to meet the day-to-day shopping needs of the surrounding population and workforce. Typically, these centres offer a mix of speciality retail floorspace, may contain a small neighbourhood supermarket (1,000sqm or less) and serves a local residential catchment within a five to ten-minute walking radius.

Relevant centres: Airds Shopping Centre, Bradbury Shopping Centre, Bradfield Street Shops, Chamberlain Street Shops, Claymore Shopping Centre, Macquarie Fields Neighbourhood, Glen Alpine Shopping Centre, Glenfield Neighbourhood Shops, Hoddle Avenue Shopping Centre, Lagonda Village shops, Kearns Shopping Centre, Leumeah, Macquarie Fields, Minto, Leumeah Neighbourhood Shops, Raby Education, Ruse Village Shopping Centre, St Andrews Shopping Centre, St Helens Park Local Shops, St Helens Park Education, Minto Education, Waminda Local Shops East and West and Woodbine Neighbourhood Centre

- **Emerging centre** – an emerging centre is land that has been identified and protected for future employment use. They are generally in locations that have been identified for residential growth. Development of emerging centres should be in line with residential growth, with commercial floorspace released in a manner that does not have an adverse consequence on existing centres.

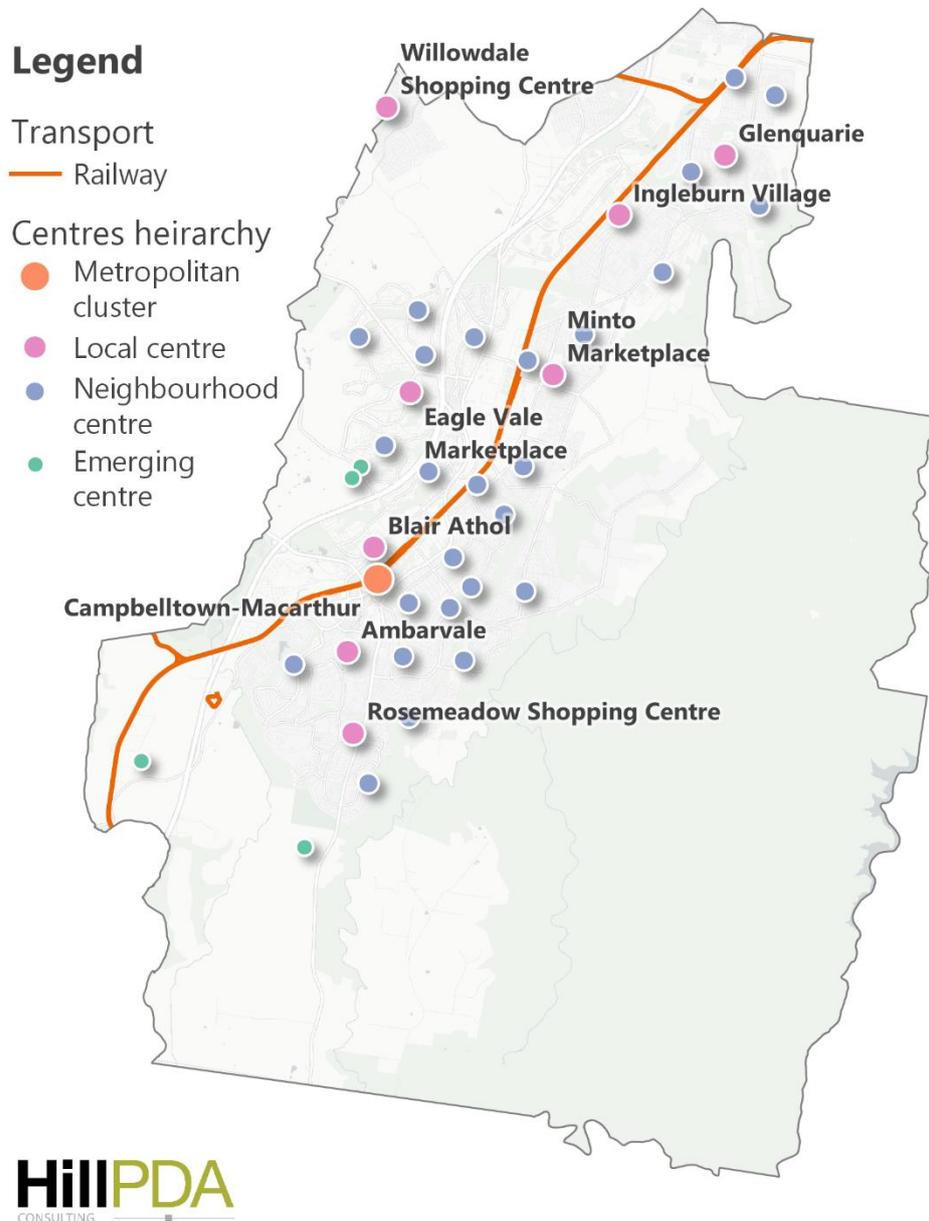
Relevant centres: Blairmount (Neighbourhood Centre), Claymore Emerging Centre (Local Centre), Gilead Emerging Centre (north and south) (Local Centre), Menangle Park Emerging Centre (Local Centre)

- **Action:** Council should consider the economic impacts of planning proposals and development applications on the proposed commercial hierarchy.

Table 13: Proposed retail hierarchy

Centre	Future role	Existing / proposed zoning
Airds Shopping Centre	Neighbourhood centre	B1
Ambarvale Shopping Centre	Local centre	B2
Blair Athol	Local centre	B2
Blairmount	Emerging centre (Neighbourhood centre)	B1
Bradbury Shopping Centre	Neighbourhood centre	B1
Bradfield Street Shops	Neighbourhood centre	B1
Campbelltown-MacArthur	Metropolitan cluster	Part B1, B3, B4
Chamberlain Street Shops	Neighbourhood centre	B1
Claymore Shopping Centre	Neighbourhood centre	B4
Claymore Emerging Centre	Emerging centre (Local centre)	B2
Eagle Vale Marketplace	Local centre	B2
Macquarie Fields Neighbourhood	Neighbourhood centre	B1
Gilead Emerging Centre	Emerging centre (Local centre)	B2 (proposed)
Glen Alpine Shopping Centre	Neighbourhood centre	B1
Glenfield	Local centre (TOD)	B4 (proposed)
Glenquarie Shopping Centre	Local centre	B2
Glenfield Neighbourhood Shops	Neighbourhood centre	B1
Hoddle Avenue Shopping Centre	Neighbourhood centre	B1
Ingleburn Village	Local centre (TOD)	B2, B4
Lagonda Village Shops	Neighbourhood centre	B1
Kearns Shopping Centre	Neighbourhood centre	B1
Leumeah (TOD)	Neighbourhood centre	B4 (proposed)
Macquarie Fields	Neighbourhood centre	B1
Menangle Park Emerging Centre	Emerging centre (Local centre)	B2
Minto	Neighbourhood centre (TOD)	B4 (proposed)
Minto Marketplace	Local centre	B2
Leumeah Neighbourhood Shops	Neighbourhood centre	B1
Raby Education	Neighbourhood centre	B1
Raby Shopping Centre	Neighbourhood centre	B1
Rosemeadow Shopping Centre	Local centre	B1
Ruse Village Shopping Centre	Neighbourhood centre	B1
St Andrews Shopping Centre	Neighbourhood centre	B1
St Helens Park Local Shops	Neighbourhood centre	B1
St Helens Park Education	Neighbourhood centre	B1
Minto Education	Neighbourhood centre	B1
Waminda Local Shops East	Neighbourhood centre	B1
Waminda Local Shops West	Neighbourhood centre	B1
Willowdale Shopping Centre	Local centre	B2
Woodbine Neighbourhood Centre	Neighbourhood centre	B1

Figure 10: Proposed commercial centre retail hierarchy



3.8.2 Strategy: Prioritise the growth and renewal of Campbelltown-Macarthur metropolitan cluster

Campbelltown-Macarthur is identified in the Greater Sydney Region Plan as a Metropolitan Cluster with the capacity to become an internationally competitive, knowledge intensive, health, education, research and innovation precinct.

The Reimagining Campbelltown project (which includes Leumeah) aims to transition the metropolitan cluster to achieve this intent, establishing a clear vision and direction for the longer term transition of the area. This strategy identifies priority projects and key actions to support this longer term transition.

The area around the Macarthur Station has been the subject of significant development interest over the past couple of decades, whereas Campbelltown CBD has lacked the same level of interest. The two areas play somewhat different roles, and there is opportunity to springboard off one to support the revitalisation of the other.

The following actions are aimed to be shorter term interventions to support the revitalisation of the area.

- **Action:** Prioritise shorter term development in Campbelltown City Centre (eastern side), rather than in the Macarthur area, particularly when it is associated with additional residential, retail or office space.
- **Action:** Consider amending the existing Campbelltown LEP standards (i.e. minimum non-residential FSR or number of commercial storeys) to increase the number of non-residential floors in the Campbelltown CBD in line with Reimagining Campbelltown City Centre Masterplan.
- **Action:** Implement the priorities and directions outlined in the Reimagining Campbelltown City Centre Masterplan and the Campbelltown Macarthur Place Strategy including actions to improve connectivity, rationalise landscape taken for car parking and build on the centres anchors.
- **Action:** Trial temporarily re-purposing the Campbelltown Council Hurley Street car park to become a market square or park that can be utilised for:
 - Nighttime market installations similar to what is achieved during the Sydney Night Noodle Markets or the ‘Eat Street Northshore’ markets in Brisbane that initially utilised temporary shipping containers to create pop-up restaurants, band spaces and informal parklets. This has now become a permanent installation that is highly frequented by tourists and residents from across South-east Queensland
 - Public domain (park) to introduce more passive spaces and trees into the centre
 - Entertainment spaces such as music performances or outdoor cinemas
 - Weekend markets to promote local artists and agribusinesses
 - Public art, street furniture and wayfinding outcomes to create a more pleasant arrival point for the civic and justice precinct.

Longer term, an integrated car park and public domain space could be achieved on part of the site (see **Case Study 2 - below**).



Case Study 2 – Cato Square Melbourne

The City of Stonnington in Melbourne has embarked on transforming a 9,000sqm car park into a new public plaza, dubbed Cato Square. Prior to the dedication of the project, the City of Stonnington had the second-lowest amount of open space per capita of all Victorian Councils and embarked on transforming the car park into a versatile facility incorporating multi-storey car parking capped by an inviting and safe public plaza. Stonnington mayor Steve Stefanopoulos said, *“Our vision is for this site to be recognized as a world-class public space that can be enjoyed by everyone. We will achieve this by transforming the existing car park into an active, vibrant, safe and exciting public open space.”* The square is currently under construction and is proposed to incorporate retail/hospitality opportunity spaces, free public WiFi, environmentally friendly design features, safe and improved pedestrian movement paths and capacity for events such as outdoor cinemas, markets, and live performances. The project was designed by Lyons Architecture and Aspect Studios.

Figure 11: Artist impressions - Cato Square, Prahan Melbourne



Source: Hunn, P 2018 'Work begins on burying 9,000m² Melbourne carpark under public plaza', viewed at:

<https://landscapeaustralia.com/articles/lyons-and-aspect-studios-to-transform-melbourne-carpark-into-public-park-1/>

Images source: City of Stonnington, 2018

- **Action:** Attract new businesses to the city centre in accordance with use and activity clusters identified in Reimagining Campbelltown City Centre Masterplan and the Economic Development Strategy. These clusters may include the
 - Commercial Core
 - Justice Precinct
 - City Centre living
 - Health, knowledge and innovation precinct
 - Cultural precinct.
- **Action:** Improve the appeal and identity of the centre to become a destination:
 - Consider opportunities for street and public art in the main street and at entrance locations to create a sense of arrival
 - Encourage public events and activities that bring families and friends into the centre such as ‘Art in the city’, ‘street fairs’, markets etc
 - Explore opportunities for pop-up activations in vacant tenancies to enhance activation and provide affordable space for new businesses
 - Investigate a building improvement project that encourages shop front renewal (see **Case Study 3**).

Case Study 3 - Gosford Business Improvement District

The concept of Business Improvement District (BIDs) first emerged in Canada in the 1960s and has become an increasingly international movement - particularly in North America and the UK¹. As defined in a recent briefing paper drafted by House of Commons Library - *A Business Improvement Districts (BIDs) are partnerships between local authorities and local businesses which are intended to provide additional services or improvements to a specified area*². Local businesses within the defined area pay a set levy to fund a business improvement manager and local programs that improve the quality of the visitor experience. Well managed BIDs can contribute to increased property values, improved sales for local retailers and decreased commercial vacancy rates³.

An example in Australia is the Gosford Business Improvement District (GBID), which is a not-for-profit organisation seeking to improve local conditions of businesses, including attracting more people into the city centre and improving the quality of visitor experiences⁴. Gosford Business Improvement District was established in 2008 "to make Gosford a safer, cleaner, more commercially vibrant, attractive city"⁵. In 2010, the Gosford BID was case-studied by NSW Industry and Investment as an example of a Business Improvement District working in NSW. GBID collects and manages the funds raised by the Gosford City Centre Improvement Special Rate Levy, which all commercial property owners in Gosford are required to pay. During the 2008/2009 financial year, this levy generated an income of around \$400,000⁶. There are also numerous other examples of successful business improvement districts operating around the world that can also be drawn upon for guidance.

¹ Empty Spaces 2010, ‘Gosford Business Improvement District’, Arts NSW, viewed at: <http://emptyspaces.culturemap.org.au/node/1482.html>

² Sandford, M 2018, ‘Business Improvement Districts – Briefing Paper Number 04591’, House of Commons Library, viewed at: researchbriefings.files.parliament.uk/documents/SN04591/SN04591.pdf

³ The World Bank 2018, ‘Business Improvement Districts’ viewed at: <https://urban-regeneration.worldbank.org/node/16>

⁴ Empty Spaces 2010, ‘Gosford Business Improvement District’, Arts NSW, viewed at: <http://emptyspaces.culturemap.org.au/node/1482.html>

⁵ Gosford Business Improvement District, 2010

⁶ Empty Spaces 2010, ‘Gosford Business Improvement District’, Arts NSW, viewed at: <http://emptyspaces.culturemap.org.au/node/1482.html>

- **Action:** To support centre vitality, explore opportunities to increase residential and worker density within the walkable catchment:
 - Consider allowing a greater density of residential and office space within the walkable catchment to support centre activation
 - Provision for a mix of housing to cater to a diversity of age groups and incomes
 - Consider investigating incentives to achieve affordable, key worker and student housing in the centre
 - As an option, investigate rezoning northern end of Campbelltown to R4 High Density to assist in consolidating the centre or alternatively, in the B4 Mixed Use zone enable a greater diversity of ground floor uses such as light industry and specialised retail, which currently do not qualify under the ‘shop top housing’ use
 - Explore the potential to continue the R3 zone between Apex Park and Campbelltown Public School, north of Lindsay Street to provide more opportunity for infill residential development
 - Consider undertaking feasibility testing to determine if the current building height controls are feasible to incentivise development or if they are instead encouraging land banking. Land banking occurs when the planning controls are at a scale where demand insufficient to meet the controls and there is a hesitation to deliver an outcome less than what the controls enable as it would not be viable to redevelop in the future. Developers instead hold on to the property until the market has caught up.





Ingleburn Village Community Facility

3.8.3 Strategy: Support the renewal of the transit-oriented local centres to work towards achieving the vision of the Glenfield to Macarthur Urban Renewal Corridor Strategy

The Glenfield to Macarthur Urban Renewal Corridor Strategy provides a plan to guide the future growth of homes and jobs in accordance with the '30-minute city' concept. As identified in the Strategy, the centres to the east of the rail line provide considerable opportunity for urban renewal and higher density development. These centres have the capacity to deliver more jobs and homes closer to public transport, enhancing accessibility, liveability and viability for businesses.

At present, the employment precincts to the west of the rail corridor are high functioning industrial areas with increasing demand. While the land may be appropriate for higher-order uses in the longer term, the demand modelling to 2041 identifies that there is little demand to rezone this land in the shorter term. Instead, priority should be given to enhancing the existing centres to the east and then re-evaluating the need for land to the west when demand is evident (see Strategy 2.7.4).

The following actions consider the strategy and the transitioning of local centres along the corridor.

- **Action:** To reiterate the commercial hierarchy and support the revitalisation of Campbelltown-Macarthur and Leumeah, consider prioritising the renewal of existing centres on the eastern side of the rail line before transitioning industrial land to higher-order residential and business uses. This will enable the ongoing use of the western precincts for industrial purposes in the short to medium term. It would also support more sustainable take-up and viability rather than over expanding the centres too quickly.
- **Action:** Consider rezoning the centres at the Minto and Leumeah rail stations to B4 Mixed Use to enhance the viability of the centres and increase residential density within their walkable catchment.
- **Action:** Consider undertaking design and feasibility testing to prioritise increasing the density of existing centres rather than rezoning and expanding the centres. This should consider the possibility of incorporating a minimum non-residential FSR provision to secure longer term commercial floorspace. Controls could include investigating:
 - At least two storeys of commercial floorspace for properties fronting the main street and/or rail line interface
 - A minimum non-residential FSR of 0.5:1 for properties in the centre frame areas.
- **Action:** Investigate a potential main street connection with cycleway and street trees along Redfern Road to improve the connection from the rail station. In the longer term, consider the opportunity of extending commercial uses along the main street interface to connect the Minto station centre to Minto Marketplace and enhance passive surveillance over the street and public recreation facilities.
- **Action:** To support the forecast growth at Macquarie Fields, investigate a new mixed use centre at the rail station to support local convenience uses.
- **Action:** Continue to conditionally support the master planning process associated with the Glenfield Urban Renewal area.

3.8.4 Strategy: Enhance the vibrancy and integration of local centres

There are a number of other local centres distributed across the LGA. These centres play an important role in providing employment opportunities and day to day goods and services close to where people live.

Some of the local centres across the LGA lack the identity and character that promote social cohesion and a sense of community ownership. They would benefit from a place-based approach to improve integration with the surrounding community, create a sense of place and promote greater business and employment opportunities through revitalisation. The following actions aim to support enhancing the vibrancy and appeal of local centres.

- **Action:** Consider developing a place-based strategy for local centres that aims to partner with the shopping centre owners with a vision to incentivise restructuring centres rather than only implementing design treatments. This could include:
 - Incorporating higher density shop-top housing
 - Encouraging the restructuring of standalone centres to incorporate a ‘main/eat street concept’ that acts as a more active interface for uses such as outdoor dining. This would require reconfiguring existing car parking and opening up the side interface of the existing shopping centre.
- **Action:** Subject to design and feasibility testing as part of the place-based approach, consider increasing the building height in local centres to incentivise redevelopment.
- **Action:** Where possible, community facilities should be integrated in centres rather than on standalone sites, this can increase passing trade and visitation numbers for local businesses.
- **Action:** Consider the opportunity to integrate higher density residential in and around local centres. This could include the opportunity for residential development to be delivered above car parking for the centre.
- **Action:** Consider undertaking a pedestrian and cycle study that explores opportunities and priorities to:
 - Identify safe connections within the walkable catchment of centres
 - Enhance the walkability of catchments through cosmetic treatments
 - Incorporate wayfinding elements for strategic connections.
- **Action:** Encourage new local centres to be designed as ‘main street’ concepts that have more desirable interfaces and sense of place. Creating informal spaces for people to meet and chat can enhance community vitality and belonging. New shopping centres should be encouraged to be delivered in a way that integrates with the street.
- **Action:** Consider the role and function of the new centre in relation to the existing centre at Claymore. While there is additional demand for around 12,000sqm, this could either be distributed evenly across both centres or consolidated in one centre to enable larger supermarket and specialty retail provision. A specific economic impact assessment should be undertaken to determine the implications of these options.

3.8.5 Strategy: Seek to provide clearer direction for B1 Neighbourhood centres adjoining education uses

There are a number of centres in the LGA that contain school sites with a B1 Local Centre zoning, which gives the impression that the amount of land available to accommodate the future commercial need, is greater than the actual amount, as school sites are unlikely to be developed for commercial purposes.

- **Action:** In consultation with the State Government, consider exploring the possibility of rezoning school sites to a more appropriate zone that reflects the use, as part of the LEP review process.
- **Action:** For centres that adjoin school sites seek to:
 - Locate community facilities, such as libraries and halls, in or adjoining centres to keep people in the centres longer and enhance passing trade
 - Enhance the connection or interface with the school to create safe environments and enhance passing trade opportunity.
- **Action:** To enhance the economic viability of centres, consider increasing residential density within a walkable catchment.

Glenfield Neighbourhood Shops



3.8.6 Strategy: Neighbourhood centres

Campbelltown’s neighbourhood centres provide retail, community facilities, and other population supportive services to meet the day-to-day convenience needs of the surrounding population and workforce. Some of the centres in the LGA need renewal to attract new business, improve safety and enhance the sense of place.

- **Action:** Investigate opportunities to locate smart business hubs in neighbourhood centres to support home-based businesses and encourage greater visitation of centres.
- **Action:** Explore opportunities for pop-up activations in vacant tenancies to enhance activation and provide affordable space for new businesses.
- **Action:** As part of the structure planning process for the Greater Macarthur area, opportunities have been identified for three new larger local centres at Menangle Park, North Gilead and South Gilead. Demand modelling indicates that additional smaller neighbourhood centres should also be considered to provide convenience services within a walkable catchment of new residents. Investigate the opportunity for additional smaller neighbourhood centres in this area.
- **Action:** Investigate a building improvement project that encourages shop front renewal (see Case Study 3).
- **Action:** Consider investigating alterations to building height controls to encourage the revitalisation of neighbourhood centres and the opportunity to deliver greater residential density through shop-top housing outcomes.
- **Action:** Explore the opportunity for a new B1 Neighbourhood Centre to provide convenience retail uses for the St Helens Park community.
- **Action:** Consider enabling home occupation and home business and permissible uses within the zone.



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